

Children's Giving Fund

Donor Application



A. DONOR INFORMATION

All recommendations pertaining to the fund require the signature of one adult donor for children under the age of 18.

Name of child: _____

Date of birth of child: _____

Child's Email

Child's Cell Phone (*optional* for text updates)

Adult 1

Adult 2

Name Relationship to child

Name Relationship to child

*Date of birth – required for security purposes

*Date of birth – required for security purposes

Business name

Business name

Business address

Business address

City State Zip

City State Zip

Business phone

Business phone

Business fax

Business fax

Home address

Home address

City State Zip

City State Zip

Home phone

Home phone

Home fax

Home fax

Email

Email

Online access to fund: Yes No

Online access to fund: Yes No

Send mail to: Home Business

Daytime phone: Home Business

B. NAME YOUR FUND

The fund is named in honor of a child (or children). Grants made from the fund are accompanied by a letter which includes the fund name as well as the name and address of the child recommending the grant, unless anonymity is requested. A fund number will be assigned to you once your initial contribution and donor application are received.

Name of fund

May we list your fund name in our Annual Report? Yes No

C. SUCCESSION PLAN

All succession plans must be submitted in writing and approved by the Jewish Communal Fund during your lifetime. You may change your successor designations at any time. You may not designate successors through your will.

Successor Recommenders. Successor recommenders assume all the privileges of recommending grant distributions and asset allocations following the death of the last surviving fund participant.

A successor recommender may designate his or her own successors.

Name

Name

*Date of birth – required for security purposes

*Date of birth – required for security purposes

Relationship to donor

Relationship to donor

Address

Address

City State Zip

City State Zip

Daytime phone

Daytime phone

Email

Email

- Each successor may act independently OR All successors must act jointly OR
 Divide remaining assets evenly to establish separate funds for each successor

Successor Charity. If you do not wish to name a successor recommender, you may recommend one or more IRS-qualified public charities, or you may choose a combination of both. If you choose both, please attach a letter describing the succession plan you would like to establish for your fund indicating what percentage will go directly to charity and who will serve as successor recommender(s) on the balance of assets in the fund.

Please note: By law, JCF is unable to make grants to certain types of charities. Please refer to the *Policies and Procedures* booklet for grantmaking guidelines.

Name of organization

Name of organization

Address

Address

City State Zip

City State Zip

Percent of fund assets

Percent of fund assets

D. INITIAL CONTRIBUTION \$1,800 is required to begin using the fund.

CASH

- Send check Make payable to Jewish Communal Fund \$ _____
- Wire cash Please call JCF before wiring \$ _____
- Credit Card Please call JCF regarding credit card fees \$ _____
- Interfund Transfer Recommend grant to JCF and
include new fund name under purpose \$ _____

MARKETABLE SECURITIES

If you are transferring securities via DTC, please send one copy of the *Securities Transfer Instructions* form to your broker and a copy to the Jewish Communal Fund.

Broker name:	Firm name:	Telephone:
Name of security:	Number of shares or units:	Approximate dollar amount:

MUTUAL FUND SHARES Please call JCF for transfer instructions.

F. ACKNOWLEDGMENTS

- ✓ I acknowledge that I have read the *Policies and Procedures* booklet and agree to its terms and/or conditions. I certify that all information in this application is accurate and complete and I will notify the Jewish Communal Fund of any changes.

- ✓ I understand that if no successor recommender or successor charity designation is on file at the Jewish Communal Fund, at the time of my death or the death of the last recommender, the income and principal remaining in the fund will be transferred to the JCF Special Gifts Fund. The Board of Trustees of the Jewish Communal Fund assumes responsibility for distributing income and principal from said Fund.

G. SIGNATURES

All donors named on page 1 must sign below to establish a fund.

Adult 1 signature	Date
Adult 2 signature	Date
Acknowledged for Jewish Communal Fund by	Date

How did you hear about the Jewish Communal Fund?

- Radio Event Mailing Press Referred by: _____

H. TIPS FOR PARENTS

Here are some suggestions for empowering your children to engage in charitable giving.

- ✓ Actions speak louder than words, so model the engagement you would like to see – Let your kids see what you do for charities, show them the satisfaction you derive from your philanthropy and discuss your motivation for supporting your charities.
- ✓ Find the teachable moments and uncover the values behind your giving. Help kids understand why you give.
- ✓ Discuss the importance of helping others and express your concerns about your community, the Jewish community and national and international issues.
- ✓ Listen to your children and learn about their interests and concerns. Nurture these interests, even if they are different than yours.
- ✓ Shabbat or any dinner-time conversations provide opportunities to share family memories or history of earlier generations and their charitable work.
- ✓ Connect the dots by examining the nexus between Jewish teachings and secular values.
- ✓ Holiday celebrations are filled with giving traditions and opportunities so incorporate tzedakah into your celebration.
- ✓ Celebrate Jewish holidays, Mother's Day, Father's Day or birthdays by asking your child to make a grant from their JCF fund in your honor.
- ✓ Acknowledge your child's accomplishments in school or the community by making a contribution to their JCF fund. This is a great way to recognize graduations, awards and other achievements.
- ✓ Don't forget that a little praise goes a long way towards encouraging children to be charitable.
- ✓ Discuss a giving goal that can help focus your teen on tzedakah. Ask your teen to decide how much they would like to give each year, and set a time table for grantmaking.
- ✓ Match grants that your teen makes from their own fund.

And remember to use your own JCF donor-advised fund. Don't have a JCF fund?

Contact us at 212-752-8277 or info@jewishcommunalfund.org

Charity is equal in importance to all other commandments combined (Baba Bathra 9a).