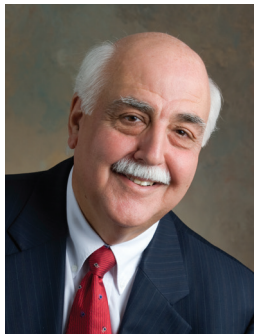


GET STARTED
TODAY!

We are here to help answer your
questions and guide you. For more
information, please contact:



Howard N. Epstein

Executive Director

402-334-6466

hepstein@jewishomaha.org



It's more than a donation. *It's your legacy.*

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HOW IT WORKS

FEATURES &
BENEFITS

Donor-Advised Fund



It's more than a donation. *It's your legacy.*

Sharee and Murray Newman



LEARN MORE

- Simply put, a Donor-Advised Fund is a personal charitable tool that helps you organize your charitable giving in one account.
- It can help you manage your philanthropy in a way that makes sense with your overall tax planning.
- A Donor-Advised Fund established with the Jewish Federation of Omaha Foundation (JFOF) has the added benefit of allowing you to support our Jewish community as well as secular charities that are important to you.

“We support the Jewish Federation of Omaha Annual Campaign as well as many other Jewish and secular charities through our donor-advised fund. We use it as a charitable checkbook and leave the accounting work to the JFOF.”

– Sharee and Murray Newman

HOW IT WORKS

- You establish a fund with the JFOF by completing a simple agreement and contributing a minimum of \$2,500.
- You contribute cash or securities to your fund at any time. You receive an income tax deduction in the year of the gift, though distributions from the fund need not occur in the same year. If you contribute appreciated assets, for example, publicly traded securities, we sell the assets and, because we are a tax-exempt organization, no capital gains taxes are payable.
- The JFOF invests your Donor-Advised Fund assets. Income is reinvested and grows tax-free. We provide you with quarterly reports of your Fund activity, either by mail or through online access.
- You recommend distributions to qualified 501(c)(3) charities from your Donor-Advised Fund. Although the fund is the property of JFOF, you and/or anyone you designate may recommend distributions to qualified charities, both Jewish and secular, from the fund at any time. The JFOF verifies the charitable status of each beneficiary organization. The JFOF Board gives its approval, then your favorite charity is promptly paid. Minimum distribution per charity is \$100. You receive a copy of the charity distribution letter.

FEATURES & BENEFITS

- A Donor-Advised Fund makes it possible for you to have a personal charitable fund in your name without any of the distribution and reporting limitations and tax filings imposed upon private family foundations.
- A Donor-Advised Fund can help in your tax and financial planning. For example, if you have unusually high income or substantial long-term capital gains in a particular year, you can contribute to your Donor-Advised Fund, receive your charitable tax deduction that year, and recommend disbursements in future years.
- Contributions to a Donor-Advised Fund are tax deductible to the full extent of the law.
- You can engage and educate your children in charitable giving if you name them as alternate or successor grant recommenders.
- JFOF charges a low administrative fee to manage all the details of coordinating your charitable giving in one easy-to-use account.
- Both the Jewish community and secular charities can benefit from your charitable giving.

***This information is not intended as tax, legal or financial advice.
Please consult your financial advisor for information specific to your situation.***