



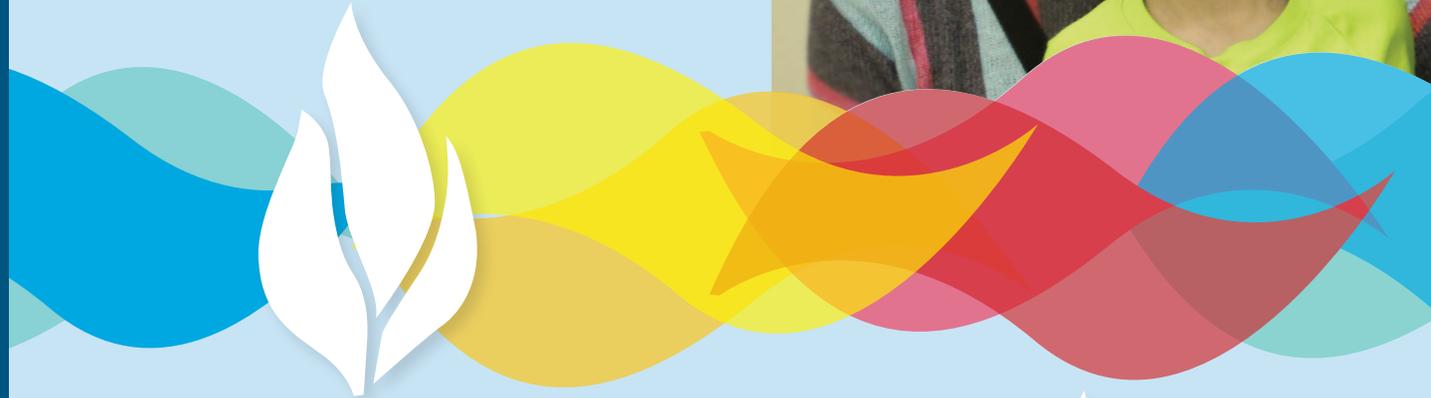
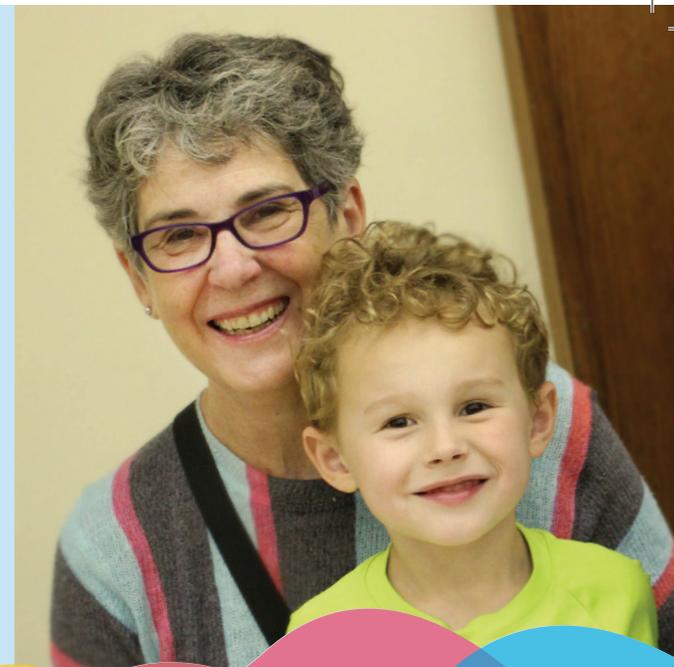
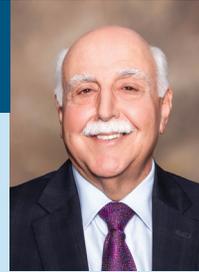
Donor-Advised Fund

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.

WE ARE HERE TO HELP

Howard N. Epstein
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It's more than a donation.

It's your Legacy.



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MAKE AN IMPACT
GIVE
TODAY WITH A
DONOR-ADVISED FUND



HOW TO OPEN YOUR Donor-Advised Fund

5 Easy Steps

- 1** Sign a simple agreement
- 2** Decide on the name of your donor-advised fund. You can name it after yourself (and spouse/partner), family, children, grandchildren
- 3** Donate funds at any time. Minimum amount to start a fund is \$2,500
- 4** Decide what to give – cash, securities, other assets
- 5** Start recommending distributions to qualified 501(c)(3) charities, \$100 minimum



WHAT IS A Donor-Advised Fund?

Simply put, a Donor-Advised Fund is a personal charitable tool that helps you organize your charitable giving in one account. You establish a fund with the Foundation by completing a simple agreement and contributing a minimum of \$2,500. You contribute cash or publicly traded securities or other assets 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. The Foundation invests your Donor-Advised assets; income is reinvested and grows tax-free. You recommend distributions of a minimum of \$100 to any IRS qualified 501(c)(3) charity, Jewish or secular, local or national, and the Foundation takes care of the details.



“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

