

# DONOR ADVISED FUNDS: A SIMPLE AND CONVENIENT WAY TO MANAGE YOUR CHARITABLE GIVING

SAVE TAXES, BE A PHILANTHROPIST, ESTABLISH A DONOR ADVISED FUND

Establish a Fund Before December 31st to Receive a 2009 Tax Deduction

More than 600 families have established donor advised funds with the Jewish Community Foundation (JCF). The minimum to establish a fund is just \$1,800. Through a donor advised fund, you can manage your giving, avoid administrative hassle and recordkeeping, connect to the community and become a more effective and informed philanthropist.



## A Family's Vision to Help the Disabled

Foundation Fund Advisors **Suzie and Dan Engel's** vision has enabled children with developmental and physical disabilities to find joy and confidence in the challenges and triumphs of baseball.

In 2005, a grant from the Daniel and Suzanne Engel Fund established the Miracle League of San Diego. Six baseball seasons later, hundreds of young people play in weekly games at Engel Family Field in San Dieguito Park which has been specially outfitted by the Miracle League to accommodate wheelchairs and assisted-walking devices. Each Miracle League team member is assigned a volunteer buddy who can help hit the ball or navigate the bases.

Giving is a family tradition for the Engels. Suzie's parents **Harriet and Sidney Schuman** and siblings, **Holly and Bruce Schuman** and **Jennifer Schuman** and **John MacDougall**, all have funds at the Foundation which have granted to Miracle League.

## Establishing a donor advised fund takes less than 15 minutes.

1. Choose a name for your fund.
2. Decide who will be authorized to recommend distributions from the fund — now and after your lifetime.
3. Recommend the investments of the fund. All earnings are credited back to the fund, giving you more to give to the community.
4. Transfer assets of \$1,800 or more. Many people contribute appreciated stock in order to avoid capital gains tax.
5. Receive an immediate 2009 charitable tax deduction for the maximum allowable for gifts to a public charity.
6. Recommend grants from the fund — on your timetable.
7. Access your fund 24 hours a day, seven days a week through the JCF's secure online system.
8. Receive quarterly fund statements and let the JCF keep your records for you.



## A Family Tradition of Philanthropy

Many parents seek ways to engage their children of all ages in giving. To accomplish this goal, **Richard and Sharon Bockoff** designated certain funds within their donor advised fund for their three adult daughters to distribute.

"The Foundation's online giving system makes it easy," said Richard. "Although our daughters live in Michigan and Georgia and we're in San Diego, we can work together as one family on philanthropy."

Through the donor advised funds and other charitable funds, this year the Foundation awarded and facilitated more than \$62 million in 4,700 grants to 1,000 organizations in San Diego, across the nation, Israel and around the world.

## Take Advantage of Our Matching Grant Incentive: Increase Your Philanthropic Impact With an Additional \$1,000 to Give Away

Establish a donor advised fund of at least \$10,000 and we will match your first grant to any Jewish organization up to \$1,000 — giving you more to help the community at a time of profound needs. Act quickly before all the slots are filled. The first 50 funds established qualify for the match; fewer than 15 slots remain.

For more information or to establish a donor advised fund, call 858-279-2740 or visit [www.jcfsandiego.org](http://www.jcfsandiego.org).