

PLEASE SEND US YOUR REFERRALS!

The Jewish Community Foundation relies heavily on the referrals we receive from Professional Advisor Council (PAC) members. In fact, referrals are our number one source for opening new donor advised funds. Visit our **Web site** to view useful questions to initiate charitable conversations with your clients. We appreciate the referrals that many of you sent our way in 2009 and look forward to receiving many more in 2010!

Since July 1, 2009, twenty-seven new donor advised funds have been established at the Foundation. We partner with more than 600 individuals and families through donor advised funds and family foundations. **Thank you for contributing to this growing number!**

Please send referrals to Julie Bronstein, Director of Philanthropy, at julie@jcfsandiego.org.

TAX UPDATE/HAITI RELIEF

Most of you are probably aware that Congress passed a law to allow individuals to deduct their contributions designated for Haiti relief on their 2009 tax returns, rather than having to wait until they file their 2010 returns. **Please be sure to share this news with your clients and continue to refer them to the Foundation for their philanthropic needs.** As the April 15th tax deadline approaches, we are happy to provide you with detailed reports to assist in tax preparation and planning for your clients who partner with the Foundation.

WEALTH TRANSFER AND PHILANTHROPY

Wealth transfers are expected to total at least \$41 trillion in the 55-year period covering 1998 - 2052. This massive transfer of wealth will have a significant impact on how your clients choose to manage their philanthropy. In June 2009, Investments & Wealth Monitor asked Paul G. Schervish, PhD, and John J. Havens to describe the primary motivators behind wealth transfers. View the **full article**.