

CHARITABLE FUNDS.  
GRANTMAKING.  
ADVISING DONORS AND THEIR FAMILIES.

ENSURING A VIBRANT COMMUNITY

# OVERVIEW

FOR GENERATIONS TO COME

## ■ THE FOUNDATION: YOUR PARTNER IN PHILANTHROPY

Since 1954, the Jewish Community Foundation of Los Angeles has served as a trusted partner and advisor for donors to shape meaningful philanthropic strategies, magnify the impact of giving, and build enduring charitable legacies. Whether you're starting on a modest scale or you oversee more substantial personal or institutional assets, we can work with you to define your goals and help plan your giving to maximize your philanthropy and tax benefits. Our depth of experience and extensive strategic collaborations with donors, family foundations, professional advisors, and community organizations can significantly enhance the effectiveness of your philanthropy.



## WORKING WITH YOUR PROFESSIONAL ADVISOR

The Foundation collaborates with professional advisors to help them address their clients' charitable giving needs. We work with your trusted advisor to create solutions for maximizing tax savings, facilitating complex gifts, selling a business, and other matters to help magnify your philanthropic impact. The Foundation is the largest manager of charitable assets and the leader in planned giving solutions for Los Angeles Jewish philanthropists and, as such, donors and advisors alike trust The Foundation to help them meet their goals.



## MAKING THE MOST OF YOUR PHILANTHROPIC CHOICES

You have a special opportunity to change our world for the better and to leave a lasting legacy reflecting your most cherished values. By creating a charitable fund at The Foundation for yourself or your family, you can support the causes and organizations you care about, Jewish or otherwise, locally, nationally, and in Israel, today and into the future.

If you:

- Are an individual, couple, or family
- Have a family foundation
- Are a professional advisor to philanthropic individuals or families

...the Jewish Community Foundation of Los Angeles has the resources and expertise to help you achieve your goals.

As the largest manager of charitable assets for Los Angeles Jewish philanthropists, The Foundation has gained the trust of many people who are passionate about strengthening the Jewish community and beyond.



# OPTIONS

Let us help you do a world of good with a strategy that's right for you, whatever your age, stage in life, and goals.

## FUNDING

When you establish a charitable fund, you can fund it now, later, or as a bequest. The Foundation accepts cash and publicly traded securities as well as, in its sole discretion, real estate, private securities, interests in a business, retirement assets, life insurance, intellectual property, jewelry, artwork and other assets.

## INVESTMENTS

Investment options vary depending on fund type and size and may include cash, selected **Fidelity** and **Vanguard mutual funds**, **Israel Bonds**, and two diversified funds—the **Strategic Return Fund** and the **Common Investment Pool**—whose managers are selected by our Investment Committee, composed of veteran investment professionals. Additional options involving outside advisors are available to Donor Advised Funds of \$500,000 or more. Note that there are market risks inherent in investments, and there can be no assurances against the risk of loss.

## GRANTMAKING

You can recommend a grant from your fund to 501(c)3 nonprofits or causes, Jewish or otherwise, locally, nationally, and in Israel. Grant procedures vary by fund type.

## SUCCESSOR FOR DONOR ADVISED FUNDS

You may appoint a successor to your Donor Advised Fund who assumes all the privileges of recommending grants following the passing of the last remaining account holder. For example, you may designate your children as successors, or you can name a charity or establish an endowment to receive the assets.

## MANAGE YOUR CHARITABLE FUND ONLINE

Donors with Donor Advised Funds can enjoy easy, secure online access to their account 24/7. You can make grant recommendations, contribute to your fund via a credit card or online check, or change your investment recommendations using the Donor Services Online feature of our website.



# TYPES OF CHARITABLE FUNDS

## DONOR ADVISED FUNDS

GIVE

A Donor Advised Fund is like a charitable checking account that you can use to recommend grants of \$100 or more to charities, Jewish or otherwise, locally, nationally, or in Israel. It's affordable, user-friendly, and maximizes the impact of your giving.

Starting at \$5,000 or more

## ENDOWMENTS

ENDOW

An Endowment provides ongoing support to one or more of your chosen charities or causes. Your endowment will be invested for generations to come, and each year, The Foundation will distribute a certain percentage of the assets to your chosen charities or causes in your name. Establishing an endowment is a meaningful way to create a legacy and honor loved ones.

Starting at \$25,000 or more

## FAMILY SUPPORT ORGANIZATIONS

PLAN

A Family Support Organization is a separate entity with public charity status that enables you to facilitate family philanthropy without the administrative and management burdens of a private family foundation. Its board of directors consists of a majority appointed by The Foundation and a minority by the donor.

Starting at \$2.5M or more

## TRIBUTE FUNDS

HONOR

A Tribute Fund enables family and friends to make tax-deductible donations via a personalized webpage to either a Donor Advised Fund or Endowment Fund in honor or in memory of someone. It celebrates milestones like a wedding, anniversary, and bar or bat mitzvah and remembers loved ones.

Starting at \$5,000 or more

## BEQUESTS

SHARE

A Bequest is a gift in your will or revocable (living) trust that allows you to secure a lasting legacy without affecting your lifetime enjoyment of your assets. You can use a bequest to fund an endowment for a favorite nonprofit, cause, or The Foundation's grant programs.

No minimum

## CHARITABLE TRUSTS

TRUST

A Charitable Trust is an estate and financial planning tool that can fulfill your charitable intentions and reduce taxes while generating lifetime income or preserving family wealth.

Starting at \$100,000 or more

# Center for DESIGNED PHILANTHROPY®

## DESIGNED GIVING MADE SIMPLE

The Center for Designed Philanthropy provides the resources, expertise, and connections to design thoughtful giving strategies tailored to your needs.

The Center works closely with donors to explore their interests and identify their passions, ultimately connecting donors with outstanding programs and organizations. This helpful resource is available to all Foundation donors.

Our experts can help you:

- **Explore** what values motivate your giving and prioritize what is most important to you.
- **Learn** about trends and leading organizations, Jewish or otherwise, that address the causes you care about locally and in Israel.
- **Connect** with leaders in the field and visit nonprofits to see firsthand the impact of your contributions.
- **Serve** the community through creative volunteer and board opportunities.
- **Join** with other donors and funders to achieve common goals.
- **Engage** multiple generations in building a legacy that reflects your shared vision for a better world.

## With guidance from the Center...



Dr. Leonard Lipman launched a diabetes management program for low-income patients at **Venice Family Clinic**.



Three generations of the Schulman family collaborated to provide scholarships for **Camp Hess Kramer**.

## FOUNDATION GRANTMAKING

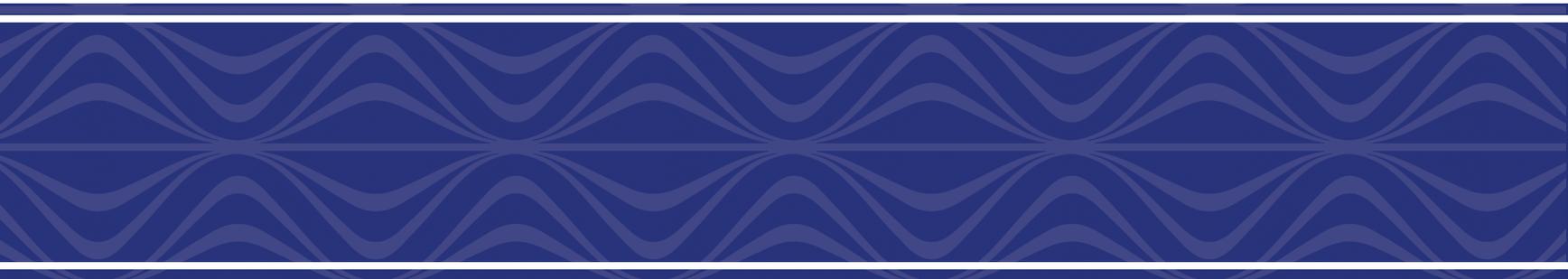
Over the past 25 years, The Foundation and its donors have distributed more than \$1 billion of grants that span a spectrum of causes locally, nationally, and in Israel, positively influencing millions of lives. Many of these grants are donor recommended, whereas others come from The Foundation's own grantmaking managed by the Center for Designed Philanthropy. These grants, made possible by bequests, endowments, and administrative fees include:

- **Cutting Edge Grants** for new and innovative programs in Jewish LA
- **Next Stage Grants** for helping Jewish organizations achieve the next level of success
- **Israel Grants** for economic development and Jewish identity
- **General Community Grants** for helping Angelenos in need
- **Capital Grants** for Jewish LA infrastructure

**HOW WILL YOU DESIGN  
YOUR CHARITABLE GIVING?**

A LEGACY IS ONLY AS  
GOOD AS WHO YOU TRUST  
TO WATCH OVER IT.

TRUST IS EVERYTHING.



THE FOUNDATION  
JEWISH COMMUNITY FOUNDATION  
LOS ANGELES