

For more than 68 years, The Foundation has helped individuals and families, institutions, and professional advisors make the greatest possible charitable impact on both the Jewish community and the community at large.

We are the largest manager of charitable assets and the leader in planned giving solutions for Greater Los Angeles Jewish philanthropists. The Foundation currently manages \$1.6 billion of assets entrusted to it by 1,400 families and ranks among the 10 largest Los Angeles foundations. Over the past 10 years, it has distributed nearly \$1 billion to thousands of nonprofits across a diverse spectrum.



Helping You Help Others

Individuals and families establish charitable funds—such as Donor Advised Funds and Endowment Funds—at The Foundation, receive an immediate tax deduction, and can then make grants to thousands of nonprofits locally, nationally, and in Israel.

The Foundation recognizes that every person is unique when it comes to their charitable giving. That's why we offer multiple fund options and customized services for wherever you stand in your philanthropic pursuits. Whether you're starting on a modest scale or you oversee more substantial personal or institutional assets, we'll help you (or your clients):

- **Define** your philanthropic goals
- **Optimize** your savings on capital gains, estate, and income taxes
- **Plan** your giving thoughtfully and strategically to maximize results
- **Learn** about charitable giving opportunities
- **Build** a charitable family legacy
- **Create** income for your retirement or for loved ones after you're gone
- **Manage** the day-to-day administration of your funds properly





Dan Rothblatt,
Executive Vice President

Why Work With Us?

You have many choices when selecting where to open a charitable fund, but we believe we stand out in our field by collaborating with donors on solutions that meet their needs and improve our community. We strive to provide a customized, rewarding, and personal experience. Here are the top five reasons donors value their relationship with us:

- 1. Convenience** — Conduct all of your charitable giving through one centralized fund dedicated entirely to your philanthropic pursuits. Through our secure and confidential Donor Services Online portal, you can recommend an unlimited number of grant distributions (minimum \$100) from your Donor Advised Fund (DAF), 24/7.
- 2. Grantmaking Expertise** — Our experts are available to help answer your questions about giving. When you call during business hours, our Center for Designed Philanthropy team of advisors can provide guidance about emerging issues, cutting-edge nonprofits, and giving opportunities locally, nationally, and in Israel, among other things.
- 3. Maximum Tax Advantage** — For each contribution to your fund, you qualify for an immediate fair-market-value tax deduction.
- 4. Educational Events** — We continually develop opportunities for donors and professional advisors to learn and network. The more philanthropic knowledge you have, the better your experience will be, so we host educational events throughout the year in donors' homes, museums, art galleries, and more.
- 5. Make Complex Gifts** — Whether you're selling a business or a share in a real estate project, we can efficiently convert that asset into charitable dollars through our team of experts. We collaborate with your professional advisor(s) and welcome complex transactions. Giving shouldn't be complicated; rather, it should be enjoyable and meaningful.



Naomi Strongin, Vice President,
Center for Designed Philanthropy

Partner with The Foundation to Enjoy Giving

More than anything, we want you to be able to focus on what really matters most: giving to causes you believe in and making an impact. Whatever path you choose, we are here to help you become the most effective and most fulfilled philanthropist you can be. Contact us today and partner with The Foundation to get started on your philanthropic journey.

Contact Our Experts



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