



AN INVESTMENT FOR THE FUTURE

A Donor Advised Fund (DAF) is like having your own foundation. Partnering with HJCF gives families the tools to protect, grow and direct charitable dollars to the organizations that they have been involved with in their lives. Some families build up money in their fund over a few years, others make an annual stock contribution at the end of the year, and the following year use their fund as a charitable checking account.

How Can We Help?

If you are considering opening a Donor Advised Fund, we would be happy to give you more information.

Contact:

Roberta Herman Dietrich
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Linda Uzick
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Cindy Dauber Anapolsky
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Call: (713) 729-7000

Visit us online at
houstonjewishfoundation.org

Thank you!

Under federal rules, your benefits may be different. Please contact us or your financial advisors for your specific benefits.



FUTURE GIVING

TAX-WISE PLANNING

DONOR ADVISED FUNDS

Ending the Year Well

Get a head start on your
year-end tax planning

HJCF Houston Jewish
Community Foundation



THE GIFT THAT KEEPS ON GIVING

Would you like to make a gift today that would enable you and your loved ones to continue to make charitable gifts in the future? When you make a gift of cash or stock to our organization, we take your tax-deductible contribution and establish a special account in your name. Your account is then invested, permitting you to recommend annual gifts to your favorite charities.

A NOTE FROM OUR CHAIR RICK STEIN

This year, I became Chair of the Board of Trustees of the Houston Jewish Community Foundation (“HJCF”). Many years ago, Paula and I created our own donor advised fund (“DAF”). In my experience, opening a DAF streamlined our charitable giving, allowed us to receive a tax deduction now and have unlimited amount of time (while the fund remained invested to generate even more charitable dollars) to decide which charities to support. However, our DAF is much more about thoughtful giving than just tax benefits.

As the end of the year is nearing, I encourage you to consider opening a DAF. There is only a \$2,500 minimum to open the DAF, and now is a great opportunity to contribute cash, or even better, appreciated stock to eliminate any capital gains tax.

THE EASE AND BENEFITS OF A DONOR ADVISED FUND (DAF)

Opening a DAF account is easy to do. Contact us to customize your fund agreement. You may fund your account with a gift of cash, securities, real estate or other assets. Check with us if you have unique or special assets that may be donated in a tax efficient way.

RECOMMENDING GIFTS TO YOUR FAVORITE CAUSES

Once we have your completed fund agreement, you are ready to begin giving! Simply contact us with your online account, in an email or by phone with your recommendations of how your DAF funds should be distributed.

MAKING A GIFT THAT LASTS

Molly & David wish to establish a fund that will make current and future gifts to their favorite charities. They make a gift of \$10,000 worth of securities to create a DAF and recommend two charities to receive fund distributions this year. Later, their children will have the right to recommend gifts from the fund. They are thrilled that they can pass on their legacy of giving to charity to their family with their DAF.