

On the cover:

Mark & Stephanie Goldstein



We are mindful every day that we - and this community - benefit greatly from the generosity of those who came before us.

We benefit from the individuals and families who established Congregation Beth Israel Ner Tamid, where we worship on Shabbat and celebrate simchas like our daughters' *b'nai mitzvah*. We are grateful to those who built the Harry & Rose Samson Family Jewish Community Center, where our children participated in many activities from day care to summer camp. We are especially grateful for those who supported Hillel Foundation at the University of Wisconsin in Madison, where we met. And these are just a few examples.

Continuing to support the organizations that we care deeply about is important to us. With all the various financial pressures on young families these days - daycare, braces, music lessons, camp, college savings - it's hard to envision ourselves like the major donors from generations prior who built these great institutions. Our Donor Advised Fund gave us the opportunity to get something started and has become a placeholder of sorts for philanthropy that fits our budget and priorities.

The Fund could not have been easier to set up. The account statements we receive in the mail prompt regular conversations between ourselves about our philanthropic goals and priorities, and also with our kids. The fund serves as an invitation to think bigger, and into the future, about what's possible. We need not wait until we are *bubbes* and *zaydes* to think about generations to come.



Jewish Community
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MILWAUKEE
JEWISH FEDERATION

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Donor Advised Funds:
Streamline Charitable Giving,
Maximize Tax Deductions

DONOR ADVISED FUNDS

Donor Advised Funds streamline charitable giving and may help maximize your tax deductions. Because they can be established with as little as \$2,500, Donor Advised Funds are accessible to many donors.

HOW IT WORKS

You can create a Donor Advised Fund with a gift to the Foundation in the form of cash, stock, mutual funds or other property. The Foundation sells assets if necessary and invests the cash in a fund that bears your name. You recommend gifts to charitable organizations at your own convenience, and the Foundation takes care of the paperwork.

BENEFITS of a DONOR ADVISED FUND

- Minimum gift of \$2,500
- Eligible for an immediate tax deduction, then recommend gifts on your own timetable
- Create a fund with your name that can last forever
- Give to Jewish and non-Jewish charitable organizations
- Receive personalized customer service
- 24/7 secure online access

DONOR ADVISED FUNDS

WHY CHOOSE A DONOR ADVISED FUND

Donor Advised Funds have many financial advantages that can boost your giving power. You'll be immediately eligible for a tax deduction and will pay no capital gains tax on any long-term appreciated securities. Many donors choose to establish (and replenish) their funds when they have appreciated assets or desire additional tax deductions at year end. With the Foundation's sound investment options, you may also maximize your charitable impact over time.

Donor Advised Funds make charitable giving easy and even more enjoyable because all you have to do is recommend gifts to support the causes you care about. You have 24/7 secure online access to your fund and can make grant recommendations online. The Foundation handles the check-writing and other paper work, provides personalized customer service and information you can trust, will work directly with you and your financial advisors, and can even help preserve your privacy by making anonymous gifts from your fund.

Many donors use their Donor Advised Funds to engage their families in the process of charitable giving. You can name your children as advisors to your fund, so you can pass on your Jewish values as well as the privilege to become philanthropists.