



FOR ADVISORS: GIFT PLANNING CAPABILITIES



ATRUSTED PARTNER

The Jewish Federation Foundation (JFF) of the Jewish Alliance of Greater Rhode Island has more than 70 years of experience as the philanthropic partner to greater Rhode Island's Jewish community. We look forward to helping your clients realize their philanthropic goals, as we work together to create a vibrant Jewish community for future generations.

All of JFF's endowment assets, donor advised funds, along with the funds of a dozen Jewish community organizations, are invested in our endowment. Currently, JFF oversees more than \$100 million in assets.

DONOR ADVISED FUNDS (DAF)

JFF has managed donor advised funds for more than 45 years. We personalize services and carefully manage investment portfolios, all with some of the lowest administrative fees available. A DAF can be established with a gift of \$2,500 or more in cash, appreciated stock, or other assets.

A DAF incurs no ongoing legal fees, no tax preparation fees, and no excise taxes, making it an attractive alternative to a family foundation. Contributions to a DAF also receive more favorable tax treatment than gifts to a private foundation. JFF handles the administrative paperwork and compliance issues, while ensuring complete confidentiality.

ENDOWMENT FUNDS FOR THE COMMUNITY

A JFF endowment fund can support organizations that mean the most to your client — from synagogues, to social service agencies, to hospitals — all while benefiting from our oversight and expert management. We ask that at least 25% of the fund's income provide unrestricted support for the Jewish Alliance of Greater Rhode Island or be allocable to one of its core strategic priorities.

An endowment can be funded over a few years, through a single outright gift, or via a bequest, a gift of life insurance, or another planned gift.

GIFTS OF UNUSUAL ASSETS

Through its partnership with the Rhode Island Foundation, JFF can accept a variety of complex assets, including closely held business interests, real property, and certain tangible personal property. JFF staff evaluates such gifts to ensure they are consistent with both JFF and Rhode Island Foundation gift acceptance policies, and these gifts may be subject to additional due diligence and administrative fees. More information about such gifts is available upon request.