

Donor Advised Fund—An Important Charitable Planning Tool

Since 1997, the Foundation for the Charlotte Jewish Community (FCJC) has been one of our Jewish community's best kept secrets. Many know FCJC for assisting local Jewish organizations with the management of their endowment funds while others connect the name with the successful Create Your Jewish Legacy (CJL) initiative.

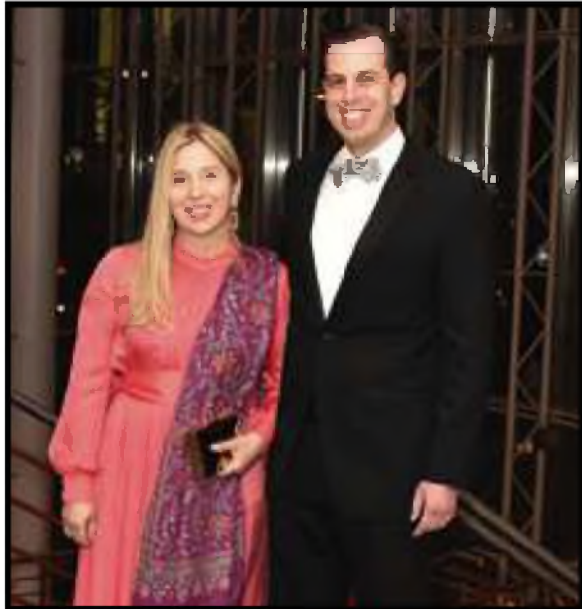
increased awareness of the charitable giving vehicle, as well as local confidence in the services and expertise that FCJC provides. "Consolidating all our charitable giving into one fund is convenient and easy, allowing us to recommend grants online to charitable organizations throughout the country," said Stephen and

They will manage this fund and make annual distributions to Jewish organizations in Charlotte. Since then, we have moved our donor advised fund to FCJC. We believe it is another way for us to support a local Jewish nonprofit organization and assist them in their community efforts."

To learn more about the many

benefits of a Donor Advised Fund and how FCJC can assist you, please contact Phil Warshauer or

Nancy Kipnis at 704-973-4544 or go to www.charlottejewishfoundation.org.



Laura and Stephen Philipson

Since 2011, FCJC has been the driving force behind CJL with the creation of more than 800 legacy gifts with an estimated future pipeline of \$25 million. However, FCJC currently manages 180 charitable funds with more than 100 of them supporting the work of our local Jewish community. The ability to assist donors with their philanthropic planning and the Donor Advised Fund (DAF) program has been the reason for the organization's recent growth.

Laura Philipson, who opened their donor advised at FCJC in 2017. "Since our gifts to the broader community are also directed through FCJC, it sends a great message to our non-profits regarding the support they receive from Charlotte's Jewish community."

For the appropriate donor, a DAF is an effective and convenient vehicle to assist with charitable giving. It can be established with a wide variety of assets, and each contribution creates an immediate tax deduction. Invest-

The increase in our donor activity reflects a greater under-



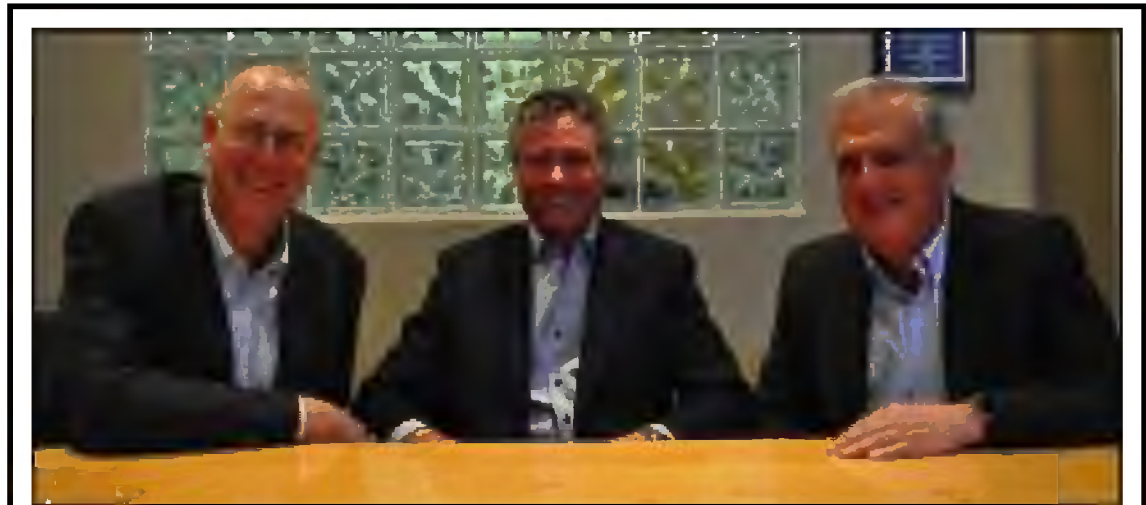
Stacey and Ira Slomka

standing of FCJC's community role and our ability to link a client's philanthropic interests with the appropriate charitable organization," said Phil Warshauer, FCJC Executive Director. "We have also benefitted from our more competitive pricing structure and our intentional increased efforts to reach more people with our message."

ment options allow your fund to grow tax-free until you recommend grants to support your favorite charitable organizations. While there are many financial institutions that assist clients with donor advised funds, a FCJC DAF supports an important institution in our Charlotte Jewish community.

Over the past six years, fifty new Donor Advised Funds were established at FCJC. Since January 2017, we have opened 27 new DAFs bringing the number of donor advised funds under management at FCJC to 76. The increase in donor advised activity at FCJC can be attributed to the

"We really like the convenience and flexibility provided by a donor advised fund in assisting us with our charitable giving," said Stacey and Ira Slomka. "We originally established one with a commercial provider. While working with our attorney on our legacy plans, we decided to establish an endowment fund at FCJC."



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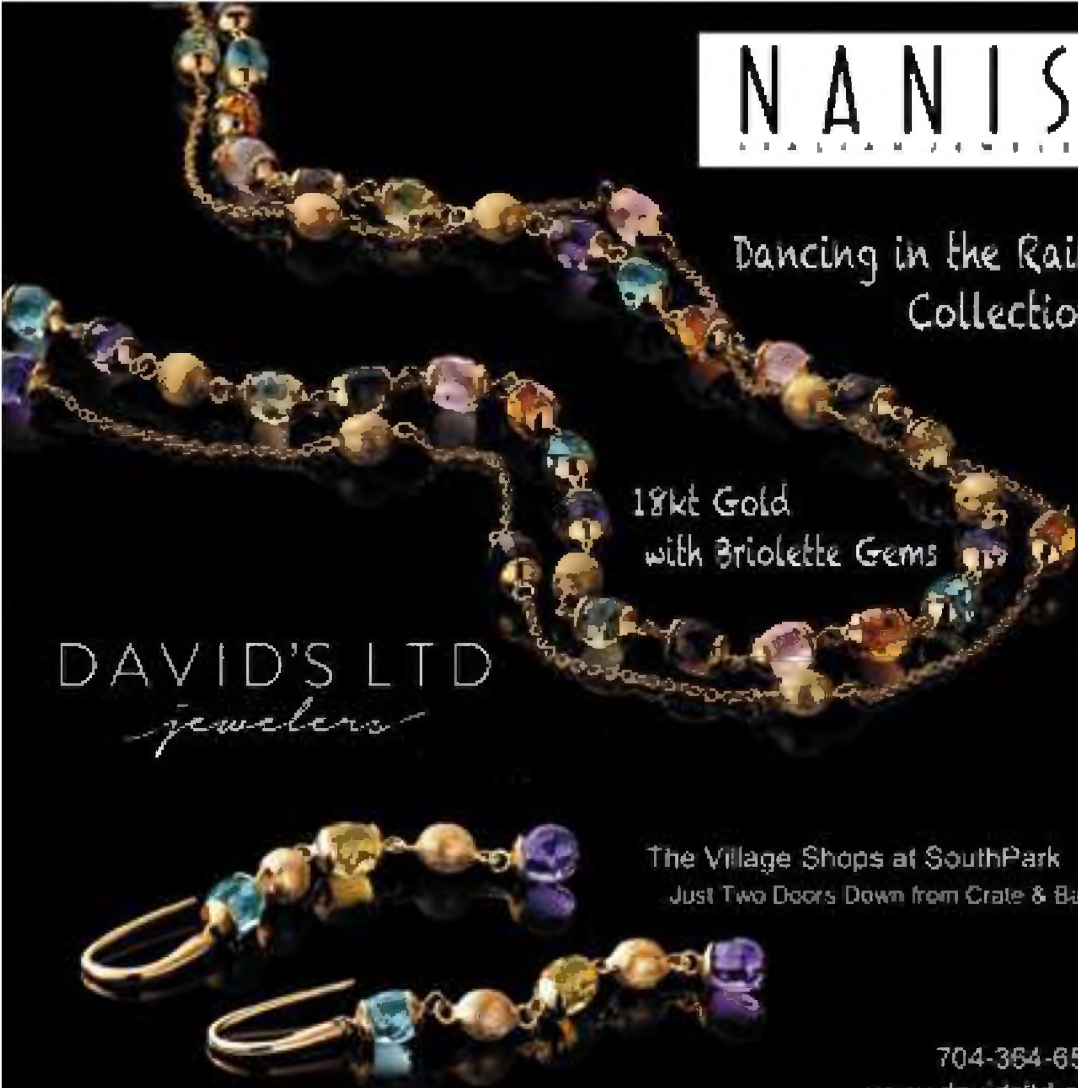
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