



FUND ADVISORS: YEAR-END UPDATE



What you need to know

Dear Fund Advisor,

Thank you for investing in our community. We deeply appreciate you entrusting us to be the facilitator of your philanthropy. Through the efforts of our donor-advised fund community, we are able to allocate millions of dollars in grants to nonprofits and essential programs that make a meaningful difference on a daily basis in the lives of people in Cleveland, Israel, and around the world.

WE ARE READY TO HELP

We know that many fund advisors want to complete their grant recommendations before the end of the calendar year – and we are ready to help you make that happen!

If you would like to schedule a meeting to discuss your grant recommendations with a member of your Federation team, please contact Michelle Feinberg, senior manager of our DAF program, at 216-593-2884 or DAFQuestions@jewishcleveland.org to set up a time that works for you.

Here are a few helpful reminders about using [FundConnect, our online DAF portal](#) that makes it quick, easy, and efficient to recommend grants at your own convenience:

- Double-check if the Money Fund balance is sufficient to pay expected grants – if they exceed the balance, we can help. Just email assetallocation@jewishcleveland.org with a recommendation to increase the Money Fund balance, and we will take care of it.
 - Remember that we will need to verify eligibility for grant recommendations to new organizations. While this can result in some additional administration time, we will do all we can to expedite the process.
-

- Please aim to submit your grant recommendations before Monday, December 1, 2024, if you would like to make sure funds are sent before the end of the year.

GIFTS OF APPRECIATED SECURITIES

Our sophisticated DAF program offers an array of funding options. For example, did you know you can contribute appreciated securities to fund a DAF? This creates the following benefits:

- May generate an immediate income tax deduction.
- Avoid capital gains taxes on the increase in the value of transferred securities.

For any gifts of securities, please contact Kari Blumenthal, managing director, finance, at 216-593-2900 or kblumenthal@jewishcleveland.org for delivery instructions.

REPLENISHING DAF BALANCES

Now could be a great time to add to the fund for possible year-end tax benefits, especially if the fund balance is low and you are planning to recommend grants in the new year. Simply reach out to us and we can help you.

DAF GRANTS TO THE CAMPAIGN FOR JEWISH NEEDS

There's still time to make your gift to our community's 2025 Campaign for Jewish Needs if you haven't already. Your gift will help keep our community safe, strong, and growing.

If you'd like, you can recommend a grant to the 2025 Campaign – or pay your gift to the 2024 Campaign – through FundConnect or by contacting us.

To learn more about the 2025 Campaign for Jewish Needs, please visit JewishCleveland.org/campaign.

AUTOMATIC CAMPAIGN PAYMENTS PROGRAM

If it would be easier for you to automate your annual gift to the Campaign for Jewish Needs, just let us know and we can help put that in place for you. This way, your gift to the annual campaign will be processed each November.

THANK YOU!

We greatly appreciate having the opportunity to help you achieve your philanthropic goals. If you have any questions at any time about the DAF program or ways in which you can best address the needs of our diverse community here or around the world, please do not hesitate to contact Michelle or a member of our DAF team at 216-593-2884 or

DAFQuestions@jewishcleveland.org.

In the meantime, thank you for being HERE FOR GOOD.



General Campaign Chair: Amir Jaffa

Board Chair: Daniel N. Zelman

President: Erika B. Rudin-Luria

Copyright © 2024 Jewish Federation of Cleveland, All rights reserved.

You are receiving this email because of your account with Jewish Federation of Cleveland Donor Advised Funds through FundConnect.

Our mailing address is:

Jewish Federation of Cleveland
25701 Science Park Dr
Jack Joseph And Morton Mandel Building
Cleveland, OH 44122-7302