



L’Dor Va Dor – Family Charitable Funds (non-endowed)

From Generation to Generation

Create or build upon a *family* tradition of charitable giving:

Open a donor advised family charitable fund

- ✓ Partner with your children and/or grandchildren
- ✓ “Gift” a fund to your children and/or grandchildren

Easily started with a tax-deductible minimum gift of \$5,000* (over 2 years, if desired)

Recommend grants to your favorite charities – local, national, Jewish or secular – right away or in the future.

Simplify the giving process – the Foundation handles writing & sending the checks and provides you with quarterly reports.

***Special Incentive program** – For a limited time, a \$1,000 contribution will be added to a new L’Dor Va Dor Fund when donor opens a fund with \$4,000 or more.

Want to learn more? Please turn the page!

The “fine print”:

Grants can be recommended once fund balance reaches \$5,000

Minimum grant amount: \$200

Maintain minimum fund balance of \$1,000

Annual administrative fee: 1.5% of fund balance or \$200 whichever is greater (\$16.67/month) – not applied until fund balance reaches \$5,000

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“Instilling the love of giving from generation to generation”

How can you open a L’Dor Va Dor Family Charitable Fund at JCFNM?

First, think about the children and/or grandchildren you would like to be advisors to the fund (must be at least 13 years old). They will make charitable recommendations in the minimum amount of \$200 to the causes they believe in.

Next, meet with JCF’s Executive Director, Erika Rimson, to start the process and to sign a fund agreement, naming the advisors to the fund you have created for them.

Finally, make an initial tax-deductible contribution to the Jewish Community Foundation of New Mexico to open your fund. As an additional incentive, a generous donor has agreed to add \$1,000 to newly opened funds for a limited time.

Feel good about creating a fund for those you love to perpetuate family giving. The JCF will notify advisors to the fund and provide instructions for recommending grants.

For more information or to open a fund, contact Erika Rimson:

erika@jcfnm.org 505.348.4472

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