

Agency Services

Investing in a Jewish Future



For over 40 years **The Atlanta Jewish Foundation** has been the trusted partner for local organizations to build and sustain their mission. With deep roots in the Jewish community and world-class financial expertise, we offer nonprofits tailored investment solutions to manage and grow their endowments and reserves with confidence and care. It's the strategic way to repair the world, both today and L'dor Vador, far into the future.



GROWING YOUR ORGANIZATION. STRENGTHENING OUR COMMUNITY.

By entrusting The Atlanta Jewish Foundation with your agency's funds, you gain:

Expert Investment Management

The Atlanta Jewish Foundation Investment Committee and outsourced Chief Investment Officer, NEPC, provide sound and innovative solutions and ensure that your portfolio aligns with Jewish values.

Tailored Support

From our easy 24/7 online portal to hands-on back-office support, our team is local, personal, quick to respond, and ready to tailor our services to your needs. We are dedicated to your mission, because we share your values.

Specialized Services

Whether you want to accept stock donations, complex/illiquid gifts, or produce individual endowment statements to steward your donors, the experts at Atlanta Jewish Foundation have the solutions for your organization.

Jewish Connection

Just like you, we are deeply committed to a thriving Jewish Atlanta. Investing with us means investing in our community, and gaining access to a wide network throughout the region, Israel, and around the world.

SERVICES

- ✓ Investment pools for diversification and Impact investing
- ✓ Endowment building, coaching, and support
- ✓ Administrative services: accounting, record keeping, and updates - including customized quarterly performance reports
- ✓ Town hall meetings with NEPC and *Bi-annual meetings to review performance, upcoming opportunities, gift acceptance policy, spend policy, and succession plan
*Upon Request
- ✓ Get featured in our marketing communications for brand recognition and fundraising visibility
- ✓ Advisory support for endowment committees and gift acceptance policies, including referrals to tax advisors and attorneys
- ✓ Aggregate reporting and best practices consulting
- ✓ Access to educational resources, community events, and networking opportunities
- ✓ **NEW!** JewishATL Nonprofit Accelerator: A two-day complimentary development coaching summit for agencies