

Donor Advised Fund Services

Taking Pride in Your Jewish Giving



PHILANTHROPIC PLANNING

Service	Basic	Premium (over \$250k)
Donor-Advised Fund welcome kit	✓	✓
Donor Services live support	✓	✓
1:1 portal tutorial for grant making	✓	✓
Custom grant recommendation	✓	✓
Charitable giving planning advice (includes Jewish values and interest exploration)	✓	✓
Due diligence on all grants	✓	✓
Succession planning	✓	✓
24/7 access to online donor portal	✓	✓
Family workshops		✓
Annual fund review meetings		✓
Comprehensive planning with client advisors		✓

EDUCATIONAL OPPORTUNITIES

Service	Basic	Premium (over \$250k)
Foundation Focus (monthly newsletter)	✓	✓
Community Conversations (curated small events with experts on a variety of topics)	✓	✓
Funder collaborative (connect with peers of similar interests)		✓

INVESTMENT

Service	Basic	Premium (over \$250k)
Investment oversight	✓	✓
Access to four investment options including Jewish-focused investments	✓	✓
Option to invest in Israel Bonds		✓
Outside management of fund option		✓