

## PHILANTHROPIC PLANNING

Service	Basic	Premium (over \$250k)
Donor-Advised Fund welcome kit containing philanthropic resources	✓	✓
Donor services live support	✓	✓
1-1 Portal tutorial for grantmaking	✓	✓
Personalized grant recommendation	✓	✓
Charitable giving planning advice (includes values and interest exploration)	✓	✓
Jewish philanthropic guidance (including development and implementation of strategic philanthropic plan)	✓	✓
Due diligence on all grant recommendations	✓	✓
Family workshops (includes children and grandchildren)		✓
Annual fund review meeting		✓
Access to national experts		✓
Advisor portal access		✓

## EDUCATIONAL OPPORTUNITIES

Foundation Focus (monthly newsletter)	✓	✓
Community Conversations (curated small events with experts on a variety of topics)	✓	✓
Exclusive invitation to mini-missions (site visits)		✓
Personalized nonprofit site visits (by invitation or per request)		✓
Personalized nonprofit meetings		✓
Funder collaborative (connect with peers of similar interests)		✓

## LEGACY PLANNING

Service	Basic	Premium (over \$250k)
Succession planning	✓	✓
Jewish Future Promise (commitment to Jewish causes)	✓	✓
Professional advisor referrals	✓	✓
Legacy Society (recognition and invitation to events)	✓	✓
Legacy story recording		✓
Facilitated family legacy conversations		✓

## INVESTMENT

Investment oversight	✓	✓
Access to four investment options (some pools include a percentage of Jewish-focused investments)	✓	✓
Option to invest in Israel Bonds		✓
Outside management of fund option		✓

## Donor-Advised Fund Fees: Your dollars at work!

All Donor-Advised Funds incur annual administrative costs and investment fees. Unlike at commercial banks, at Atlanta Jewish Foundation, fund fees are reinvested into the Jewish community through programmatic work, staff support and grantmaking.

## FEE SCHEDULE

First \$500,000	100 Basis points (1%)
Next \$500K-\$10M	50 Basis points (.50%)
Over \$10M	30 Basis points (.30%)
Real Estate/Illiquid Asset	\$2,500 per asset, other fees may apply

The minimum initial contribution to open a Donor-Advised Fund is \$2,500, maintaining a minimum daily balance of at least \$1,000. All Donor-Advised Funds will pay an annual fee of \$250 deducted from the fund to cover the costs involved in administering grants and providing donor services. These fees are subject to change, pursuant to decisions made by the Federation President/CEO, Chief Financial Officer, and the Atlanta Jewish Foundation Oversight Committee.