

A SPECIAL ZOOM PROGRAM

JEWISH COMMUNITY FOUNDATION INVESTMENT SUMMIT

WEDNESDAY, MAY 19, 2021 at 7:00 PM

Join this virtual program to learn directly from our professional investment manager, Dan Voss CFA CAIA, about updates on market trends and the performance of the Jewish Community Foundation investment portfolio.

FEATURED SPEAKER

DAN VOSS, CFA, CAIA

Dan Voss is a senior investment consultant in Vanguard Institutional Advisory Services (VIAS), where he assists institutional clients with asset allocation, portfolio design and investment policy consulting for endowment and foundation portfolios. He previously was an investment analyst in VIAS and has been with Vanguard since 2011.



REGISTER IN ADVANCE FOR THIS MEETING

<https://tinyurl.com/ynmv6a7d>

After registering, you will receive a confirmation email with a Zoom link. If you have questions or need more information, please contact Amy Zacks at 609-524-4374 or amy@foundationjewish.org

FOUNDATION NEWS

From January through April, three **LIFE & LEGACY workshops** were held for the **Somerset, Hunterdon & Warren Counties** region, along with one-on-one meetings with partner organizations. JCFGM is pleased to collaborate with our neighbors to the north to secure the future of their Jewish communities.

We welcome **Temple Shalom of Scotch Plains, NJ** for opening a **LIFE & LEGACY Fund** at our Jewish Community Foundation.

Thank you to the **Jewish Community Youth Foundation (JCIFY)** for its grant in support of our Foundation's **Book Awards** program. This annual scholarship provides financial assistance for area college students to purchase academic books and other supplies.



LEGACY DONOR APPRECIATION EVENT MAY 25, 2021 AT 7:30PM

The Harold Grinspoon Foundation is hosting a **Legacy Donor Appreciation Event** to honor the 18,000 individual donors nationwide who have made legacy gifts within the 8 years of **LIFE & LEGACY** to secure the future of our Jewish communities.

If you are a **LIFE & LEGACY** donor in our region, we encourage you to participate in this evening of gratitude. To register for the online event on **Tuesday, May 25 at 7:30pm**, please go to: <https://www.surveymonkey.com/r/2021LegacyDonorEvent>

If you would like more information about this program or how you can make a **LIFE & LEGACY Promise** to your favorite Jewish organizations, please contact Amy at amy@foundationjewish.org.

Why We Made Our Promise to Give Today and Tomorrow

By Amy Zacks

My daughter Noa became a Bat Mitzvah during the pandemic. Instead of standing on the bimah at The Jewish Center (TJC) and reading Torah before a sanctuary full of family, friends and congregants, we marked this milestone occasion much differently. A Zoom service was created from our living room, with a homemade ark, a borrowed Torah, and a transformed child. The emotional journey to accept and embrace the changes imposed on her only reinforced Noa's commitment to her Jewish identity and to our TJC community. This served as an important reminder about the meaningful role of TJC in our lives. It's the place where we have educated our children, celebrated holidays, built friendships, volunteered our time, participated in social action and maintained a connection to community. TJC truly represents a cornerstone of our lives, and I hope it can serve in the same way for future families.

That is why we decided to leave a LIFE & LEGACY Promise to TJC to do our part to ensuring a future for the congregation. And we left our Promise in an easy way that also engages our family in giving today. We opened a donor advised fund, The Zacks Family Tzedakah Fund at the Jewish Community Foundation, and we created a new family tradition too. Every year, on each of our birthdays, the kids, my husband and I will choose a charity to support through the fund. On my recent birthday, I chose the Parkinson's Alliance. Through a DAF, you can support any cause - Jewish or secular - at any time, and you can designate recipient organizations (just like a beneficiary of an IRA or life insurance policy) to receive the fund's assets upon your passing. Taking these steps were a win-win for our family. We get to support our favorite causes today and help support TJC tomorrow. Noa's birthday is next... and I can't wait to learn which charity she has chosen to support through the fund.

Amy Zacks is Director of Philanthropy at the Jewish Community Foundation



Pictured above: The Zacks Family at Noa's Bat Mitzvah in August 2020

SUPPORTING CHARITIES WITH A Donor-Advised Fund

HOW IT WORKS



1 DONATIONS

A donor makes an irrevocable, **tax-deductible donation** to the Jewish Community Foundation.



2 INVESTMENTS

The donation is used to establish a **Donor Advised Fund**, and the assets in the fund will share in the market performance of the Foundation's investment portfolio, including interest and dividends.



3 GRANTS

The donor may **recommend grants** to qualified public charities. All recommendations are honored so long as the recommended donations meet IRS requirements.



To learn more about donor advised funds at the Jewish Community Foundation, please contact Amy at 609-524-4374 or at amy@foundationjewish.org