



Designated Funds Support Your Favorite Causes Forever



Every fund holds a story, and you can tell yours through your Designated Fund.

Designated Funds are endowment funds that ensure your favorite nonprofit organizations and causes receive an annual stream of income — forever — to help them sustain a vibrant future. You can honor your family or the memory of a loved one by naming the fund after them.

How It Works

- Select the cause or organization you want to support and name your fund (e.g., the Smith Family Fund).
- Provide a gift of \$5,000 or more (e.g., cash, stocks, real estate, or other assets), or build up to this level over two to five years.
- Your endowed fund is pooled into a diversified portfolio, managed by expert investment professionals, to maximize current grant dollars available while preserving the principal in perpetuity.

(continued on reverse)



Designated Funds

Support Your Favorite Causes Forever (continued)

How It Works (continued)

- Every year, approximately 4 percent of the asset value of your fund is granted to your designated beneficiary while we continue to maintain, invest and grow your fund's assets.
- The Foundation handles all administrative requirements and provides detailed reports to you and your beneficiary.

Support What Matters Most to You

Each year, we distribute approximately \$2 million in grants from Designated Funds. These grants allow beneficiaries to continue their important work, such as feeding the hungry, educating students, and supporting new programs at synagogues.

Example of Grants in Action

The Edith B. Goldberg and Ruth D. Goldberg Memorial Fund supports social group activities for Holocaust survivors, and Jewish Book Club and fitness programs for over 500 senior adults at the [Mandell Jewish Community Center](#), fulfilling the donors' wishes for seniors to live healthy and active lives.

Explore Your Giving Goals

Our expert staff is ready to help you. Please contact Michael Elfenbaum, VP of Community Engagement, at 860-523-7460.