

Fund Guidelines

Please see below for different philanthropic fund options at the Jewish Federation & Foundation of Northeast Florida. The Planned Giving & Endowment Department is available to answer any questions that you may have regarding your current fund or for establishing a new one.

Designated Endowed Funds

\$25,000 Minimum

A designated fund allows donors to specify particular organization(s) they want to support over time. Through a designated fund, the donor commits their resources to a specific charity or charities, ensuring their contributions consistently benefit the chosen entity.

Lion of Judah Endowment

\$125,000 Minimum

The Lion of Judah Endowment (LOJE) is a philanthropic initiative that enables women who are part of the Lion of Judah giving society to create a permanent endowment fund in their name. This endowment ensures ongoing support for the Jewish community by perpetuating a woman's annual Lion of Judah gift to the Jewish Federation, even beyond her lifetime.

Donor Advised Fund

\$10,000 Minimum

A Donor-Advised Fund (DAF) is a charitable giving account set up through a public charity, allowing donors to make a charitable contribution, receive an immediate tax deduction, and recommend grants to nonprofit organizations over time. The sponsoring organization legally controls the funds, but donors retain advisory privileges on how the money is distributed.

Endowed Donor Advised Fund

\$25,000 Minimum

An Endowed Donor-Advised Fund (DAF) is a charitable giving fund where the principal is invested to generate income for long-term grantmaking. Unlike a regular DAF, only the earnings (or a portion of them) are used for donations, allowing the fund to support charitable causes indefinitely.



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Field of Interest Fund

\$25,000 Minimum

A Field of Interest Fund is a type of charitable fund that allows donors to support a specific area of interest—such as education, the arts, healthcare, or the environment—without designating a particular organization.

Unrestricted Named Fund

\$25,000 Minimum

An Unrestricted Named Fund is a charitable fund established in the donor's name that allows the Jewish Federation & Foundation of Northeast Florida to use the funds wherever the need is greatest. While honoring the donor, it provides funding for community grants.

Fee Structure:

Annual administrative fee is applied quarterly/\$50 minimum per quarter.

Tiered fee base on fund size:

1.00% first 2 Million, 0.80% next 4 Million, 0.60% next 4 Million, 0.40% on the remaining balance

Donor Advised Fund Fee: 1.1%

Grant Minimums: \$250 for all grant recommendation

Agency Funds:

Partner Agency Funds that agencies initiate but are invested through the Jewish Federation & Foundation of Northeast Florida will incur a 1.0% fee. Fee is capped at \$10,000 annually.

Questions?

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