

JEWISH FOUNDATION
OF GREATER TORONTO

DONOR ADVISED FUNDS

An easy and thoughtful way
to support the charities you care about.

WHAT IS A DONOR ADVISED FUND?

A donor advised fund (DAF) is a formally structured vehicle for charitable giving that enables donors to recommend which initiatives and charities will receive their donations each year. A DAF's flexibility allows someone to set aside tax-receipted dollars now and enjoy growth for future philanthropy.

The assets of the DAF grow tax-free. Since a DAF is a part of the Jewish Foundation, all the contributions into the fund qualify for the favourable tax rules that apply to public charities.

WHAT IS THE JEWISH FOUNDATION?

The Jewish Foundation of Greater Toronto works to sustain the Jewish community for the long-term by partnering with individuals, families, advisors, and organizations to achieve their philanthropic goals. By contributing to the Foundation and its pooled assets, donors can have an even bigger impact on the causes that mean the most to them.

BENEFITS OF A DAF AT THE JEWISH FOUNDATION

- Initial balance of \$10,000
- Low administration fees
- Anonymity and privacy, if desired
- Flexibility and ease
- Professional and customized support of a philanthropic advisor
- Community knowledge and expertise
- No minimum for annual contributions or distributions
- No CRA filing
- Succession planning

INVESTMENTS

The Jewish Foundation's pooled assets are invested in accordance with an investment policy designed to produce long-term returns with a reasonable level of risk. Our Investment Advisory Committee is made up of seasoned professionals who prudently invest, manage, and monitor the portfolio in alignment with the Foundation's mission.

9.6%

**ANNUALIZED RATE OF RETURN
OVER 10 YEARS (AS OF JUNE 30, 2026)**

HOW DAFS WORK AT THE JEWISH FOUNDATION

1



OPEN A FUND

You can open a fund any time of year.

2



CONTRIBUTE

Contribute to your fund and receive a tax receipt.

3



INVEST

The contribution is professionally invested.

4



GRANT

You recommend grants to charities.

5



REPORT

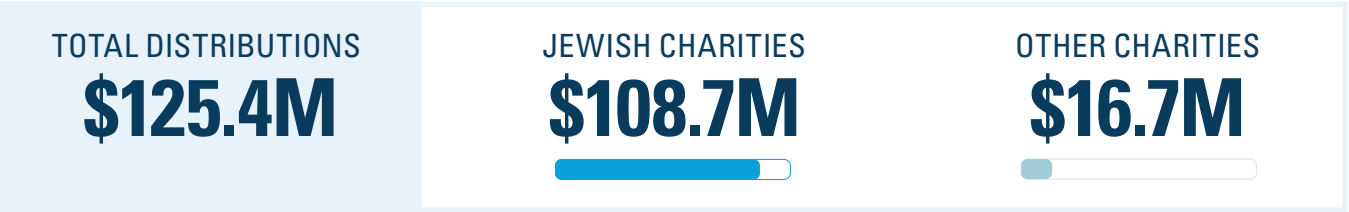
You receive annual fund statements.

COMPARE YOUR CLIENT’S CHARITABLE GIVING OPTIONS

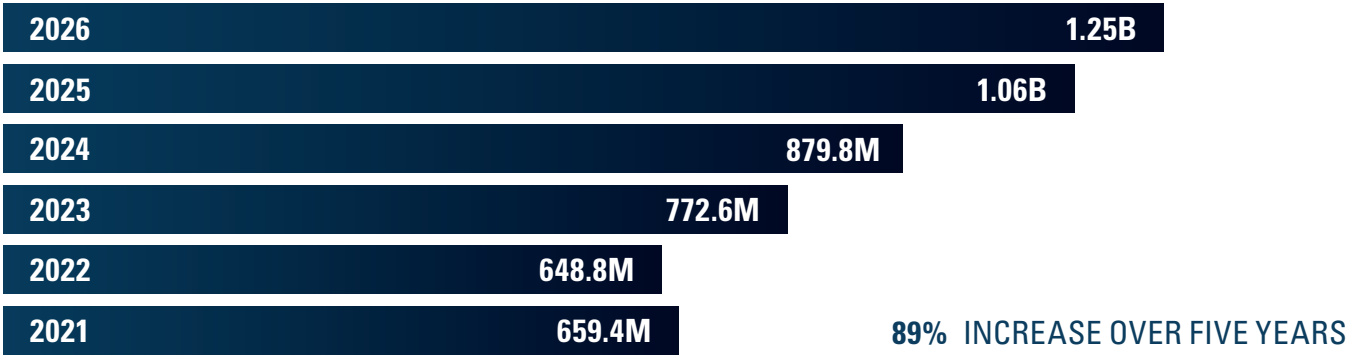
	JEWISH FOUNDATION	PRIVATE FOUNDATION	FINANCIAL INSTITUTION
Minimum to open	\$10,000 \$5,000 for those under 45	Typically \$1,000,000–\$3,000,000	Typically \$10,000–\$100,000
Fees	No upfront fees Admin fees 1% and lower Average investment management fee 0.5-0.6%	Fees for investment management, legal, audit, bookkeeping, and tax returns	Admin and investment management fees can total more than 2.5%
CRA filing	No	Annual	No
Annual contributions	No minimum	Minimum contributions vary	Minimum contributions vary
Annual distributions	No minimum	Minimum 5%	Typically Minimum 5%
Investment management	Assets are pooled and invested by professional investment managers and monitored by an Investment Advisory Committee	Directors or trustees must manage investments directly or supervise professional managers	Often limits investments to a bank-owned investment product, managed by a single advisor
Privacy	Flexible	Public filings	Flexible

JEWISH FOUNDATION FINANCIAL HIGHLIGHTS

FOR THE YEAR ENDED JUNE 30, 2026



ASSETS UNDER MANAGEMENT



Contact us today

for more information on what we can do together.

416-631-5703

jewishfoundation@ujafed.org

jewishfoundationtoronto.com

Sherman Campus

4600 Bathurst Street

Toronto, Ontario M2R 3V2



UJA FEDERATION | JEWISH
of Greater Toronto | FOUNDATION

Jewish Foundation of Greater Toronto
4600 Bathurst Street Toronto, Ontario M2R 3V2