THE JEWISH COMMUNITY FOUNDATION OF MONTREAL

Donor Advised Fund

Your own philanthropic "bank account"—give with flexibility and ease

A Donor Advised Fund (DAF) at the Jewish Community Foundation of Montreal (JCF) is your simple, centralized hub for giving. When you make an irrevocable gift to your fund, you receive an immediate charitable receipt. From there, you can recommend grants to the causes you care about, on your own timeline. We handle all the administration, so you can focus on the joy of giving without any administrative burdens.

Who is this for?

- Individuals or families who want to make a charitable gift now, receive a donation receipt and have the freedom to decide which charities to give to when they want to
- Those who prefer to centralize all charitable grants and records in one place
- Donors who are looking to make tax-effective donations that can support their philanthropy as well as their financial planning
- Families seeking to pass on their philanthropic values through a multi-generational giving vehicle

What are the key benefits?

SUPPORT FOR MULTIPLE CAUSES
Give to any registered Canadian charity—and in some cases to non-qualified donees—at any time, and with flexible amounts.

EASY, FLEXIBLE GRANTMAKING
Donate now and grant later. Use our secure online Fund Advisor Portal to make grants, or simply call or email.

CENTRALIZED ADMINISTRATION We handle the processing of all your grants, and keep all records and giving history in one place.

GROWTH TAX-FREE Investment returns inside your DAF are not taxed, potentially increasing your philanthropic dollars and impact over time.

How it works

Contribute

You donate assets into your DAF (cash, marketable securities, and other eligible assets) at the JCF and receive your donation receipt.

Invest

Your fund can be invested in JCF's pooled investment fund.

Or, in some cases, you can recommend your own investment advisor.

Grant

When you're ready, you make a grant to a registered Canadian charity (or potentially a non-qualified donee)—anytime and at any amount.

Impact

We issue the grant on your behalf or anonymously, handle due diligence, reporting, and disbursement. The impact of your gift is felt immediately.

Choosing when to contribute or grant can matter a lot: timing affects tax planning or taxes owed. Our philanthropic advisors help tailor your giving plan to your life goals and community interests.

You can name co-advisors on your fund as well as successors to ensure giving continues over generations.

Why Choose a DAF at the JCF?

EXPERT GUIDANCE
Our team of professionals brings vast and diverse experience to the table as well as knowledge of communal priorities.

TAILORED PHILANTHROPY
Structure your giving based on your objectives and values, and customize your legacy strategy.

CONVENIENCE AND TRANSPARENCY
Easily track your fund's balance, history, and grants via our Fund Advisor Portal.

COST-EFFECTIVE
The JCF's low administrative fees enable more of your funds to be directed to your causes for maximum impact.

AN UNPARALLELED LEGACY
For over 54 years, we have successfully represented thousands of fundholders. At the JCF you're not just opening a fund, you're joining a community that wants to do more with their giving.

Additional Resources

Watch our explainer video | Visit our webpage | Read our article

Working with the JCF means convenient online access to make a donation, set up recurring donations, no more chasing tax receipts, and visibility to see what you have done in previous years. Everything is at your fingertips. Quarterly and yearly statements give you a comprehensive summary for your year. And the team is there to help you. It's giving made easy.

- Howard Stotland

About Us

With over $2.7B in assets under management, the Jewish Community Foundation of Montreal has been helping people make a meaningful and lasting impact with their philanthropy for over half a century—it is ***Where Smart Philanthropy Starts™***. Through an extensive professional team, the JCF provides a comprehensive range of services including endowment management, philanthropic planning, and educational resources to enable individuals and their families effortlessly fulfill their personal philanthropic goals in a tax-efficient manner.

Contact Us

info@jcfmontreal.org | **(514) 345-6414**

Our experienced philanthropic advisors are dedicated to helping you along your philanthropic journey.

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Where smart philanthropy starts®

These descriptions are informational only and do not constitute legal or tax advice as to how a specific gift vehicle will impact you. Always consult with your professional advisors.