

LEARN MORE ABOUT GIVING OPTIONS

Create or Add to a Donor Advised Fund

- Like a charitable checking account, a Donor-Advised (Philanthropic) Fund offers an effective way to manage charitable giving.
- Establish and add to your fund with cash, securities, or other assets.
- Benefit from a tax deduction when you contribute to your fund and recommend distributions to charities you want on your timeline.
- Funds are invested and grow tax-free.
- Take advantage of the Shalom Austin Jewish Foundation's knowledgeable staff to engage your family in important charitable conversations and vet nonprofits in Austin, nationally and internationally.

Use Appreciated Assets (Stocks)

- A best practice: receive an immediate income tax deduction based on full, fair market value of the securities and avoid paying capital gains tax on appreciated securities held for more than one year.
- Give directly to a non-profit or to a fund at the Jewish Foundation.

Look into an IRA Charitable Rollover

- If you are 70.5 or older, you can transfer up to \$100,000 directly from your IRA to charity, free of any income tax.
- If you are 73 or older you must take a Required Minimum Distribution (RMD) from your IRA, this can also be donated directly to charity, tax free.
- Think about using IRA distributions to open a Designated Fund at Shalom Austin Jewish Foundation. A designated fund enables you to support your favorite charity for years to come or to create a legacy gift after your lifetime.
- Reduce your taxable income, even if you do not itemize deductions; this gift is not subject to the deduction limits on charitable gifts.

Donate Appreciated Real Estate or a Vacation Home

- Avoid paying capital gains tax on the sale of real estate.
- Receive a charitable income tax deduction based on the value of the gift.
- Enjoy your home for as long as you wish or for the remainder of your lifetime or for the remainder of your lifetime.

DISCLAIMER: The Shalom Austin Jewish Foundation does not provide tax advice. Please consult with your professional advisor before taking any action. As with any significant tax and charitable planning, it is advisable to carefully consider potential changes in the context of your complete financial profile.



"Contact me if you have any questions or know someone who would like to learn more."

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