



SHALOM AUSTIN 
Jewish Foundation



Open a Donor Advised Fund

Join the community of fundholders at the Shalom Austin Jewish Foundation by opening a Donor Advised Fund (DAF) to maximize your philanthropy.

NOW

is the time to open a DAF if you have been considering it.

NOW

is the time to move your DAF to the Jewish Foundation.

WHY NOW?

Shalom Austin will contribute \$500 to new funds opened between January - June 2026.

Contributions to new DAFs opened at the Shalom Austin Jewish Foundation are generously underwritten by the Jessica and Joel Levine Family Fund.

Donor Advised Funds

Donate Cash or Appreciated Assets

- Eliminate capital gains taxes
- Receive charitable deduction
- Track ONE tax receipt

Choose Investment Pool

- Assets grow tax-free so you have more to give

Give Anytime

- Respond quickly to community needs
- Give to any charity of choice
- Manage giving in one place

A Donor Advised Fund (DAF) investment account is specifically for charity and is one of the most efficient ways to manage your philanthropy.

DAFs can accept a variety of assets and can be invested for tax free growth, potentially yielding more for you to give.

You are generally eligible to take an immediate tax deduction when you donate to a DAF, then enjoy the flexibility of making grants to any eligible non-profit on your own schedule.



Our DAF is a hub for all our giving. We can easily make donations and track our giving over the years. We can also be more thoughtful in honoring our values of tzedakah and tikkun olam.

Frances and Adam Meltzer,
fundholders since 2020

Continue to give to your favorite non-profits and let Shalom Austin Jewish Foundation handle the administrative details.



Our Donor Advised Fund streamlines our giving, supports the Jewish community, and helps us teach our children about philanthropy.

Aly and Brandon Phillips,
fundholders since 2023

How a Donor Advised Fund Works

Donate

Open your fund with a gift of cash or other assets and receive an immediate tax deduction.

Grow

Select one of our expertly managed investment pools so your assets grow tax-free.

Manage

Monitor your fund through our online donor portal and monthly or quarterly statements.

Give

Give anytime to the charities of your choice, and manage your giving all in one place.

Ways to Give

- Bonds
- Business interests (non-publicly traded or closely held stock, partnership interests, etc.)
- Cash (includes credit card and electronic funds transfer)
- Estate and trust assets
- Life insurance policies
- Mutual fund shares
- Oil and gas, mineral or timber rights
- Private and publicly traded securities
- Real estate property
- Tangible personal property

How a Donor Advised Fund Works

Gifts of appreciated assets can be transferred directly to a DAF for the full value, allowing you to avoid capital gains and additional income taxes that would apply.

Selling securities and donating the cash:		Donating the securities directly:
Fair market value of stock	\$5,000	\$5,000
Long-term capital gains tax estimate	\$375	\$0
Amount available for charity	\$4,625	\$5,000

This hypothetical case study is provided for illustrative purposes only.

The Shalom Austin Jewish Foundation does not provide tax advice. We recommend consultation with professional advisors to carefully consider giving in the context of a complete financial profile.



Why Partner With Us?

Community

More than 125 households have chosen the Shalom Austin Jewish Foundation as the home for their Donor Advised Fund. You will join a community of individuals, families, and organizations committed to investing in our Jewish community, the Greater Austin community, and charitable organizations elsewhere that reflect your values and interests.

Service and Expertise

Give to your favorite non-profits and let the Foundation handle the administrative details. We are your philanthropy partners.

Our Philanthropy Team has deep knowledge of local, national and international Jewish giving, as well as experience in a range of fields in the secular arena including access to and relationships with Austin non-profit communities.

Reduce Taxes

We can help you make the most of appreciated assets and high-earning years, and our Foundation team is always willing to work with your professional advisors to ensure your philanthropy is maximized. DAFs can reduce tax burdens after a windfall situation, such as receiving an inheritance, selling a business, or experiencing strong market returns. You can take an immediate tax deduction when you make a charitable contribution to your DAF, reducing your tax liability and effectively pre-fund years of giving with assets from a single high-income event.

Amanda Sokolosky, Foundation Assistant
(512) 735-8210 | amanda.sokolosky@shalomaustin.org
shalomaustin.org/daf