



JEWISH  
COMMUNITY  
FOUNDATION  
of GREATER MERCER

## Instructions for Establishing a Donor Advised Fund

1. These instructions apply to Donor Advised Funds that meet the following criteria. [If these criteria are not met, please contact the Foundation Director for guidance.]
  - a. The Donor(s) must be individuals.
  - b. The Recommenders must be from among the Donor(s), the Donor(s) children, and the spouses of the Donor or Donor(s) children.
  - c. The gift must be in cash or in publicly traded securities that can be readily sold on the day they are delivered to the Foundation.
  - d. The minimum amount to establish a Donor-advised Fund is \$6,000. [There is a procedure for making the donation in installments; contact the Director for details.]
2. Please fill in the blanks in the Gift Form, as follows:
  - a. Date: The day the form is signed or sent to the Foundation.
  - b. Donor: Usually an individual but can be a Husband and Wife or any related group of people.
  - c. Name of Fund: Can be any suitable name. Common ones are "John and Jane Smith Charitable Fund," "Smith Family Fund," or "John Doe Memorial Fund."
  - d. Property Donated: Please indicate amount of cash or the security name and number of shares.
  - e. Recommenders: These are the people who may recommend that the Foundation make gifts of income and principal of the Fund and may be the Donor(s), children of Donor(s), and spouses of Donor and children.
    - i. Some Donors name themselves as Recommenders, with their spouse and/or children to act as Recommenders on their death.
    - ii. If there is to be more than one Recommender at any given time, please indicate in paragraph 4(b) if all the Recommenders must act jointly. If not, the Foundation will consider the recommendation of any individual Recommender.

- f. We routinely list donor-advised funds in our Foundation Annual Report and other publications. If you would like to withhold this information, please indicate so in paragraph 6.
3. If the fund gift is to be stocks or securities, please contact the Foundation office (609-219-0555) for directions on how to transfer the stock or securities.
4. Please make checks payable to: Jewish Community Foundation of Greater Mercer. Please deliver the Gift Form and any checks to the Foundation at 4 Princess Road, Suite 206, Lawrenceville, NJ 08648. A copy of the **Establish a Donor Advised Form**, executed by the Foundation, will be returned to the Donor.
5. Recommendations may be made at any time, either emailed, written requests, or on forms that may be obtained from the Foundation Office. Reports on fund activity are mailed to donors on a quarterly basis.
6. Please note that Donor-Advised Funds may not be used to discharge any legal obligation of a Donor or Recommendor. A signed pledge card for a charitable campaign creates a legal obligation. Instead, you may advise charities of your “intent to recommend” a certain amount from your donor-advised Fund on behalf of that charity. Please note that synagogue dues may be considered a legal obligation, but you may recommend other gifts to a synagogue.
7. For any further questions, please contact the Foundation at 609-219-0555 or [info@jcfgreatermercer.org](mailto:info@jcfgreatermercer.org)