



Charitable Gift Management Programs (CGM)

of the Jewish Foundation of Memphis

September, 2010

**JEWISH
FOUNDATION
OF MEMPHIS**

	Donor Advised Philanthropic Funds	Super Donor Advised Philanthropic Funds	Family Foundations (Support Organizations)
Minimum gift	\$5,000	\$500,000	\$1,000,000
Donor chooses fund name	Yes	Yes	Yes
Donor selects advisors and successor advisors	Yes	Yes	Minority
Fund has its own bylaws & charter	No	No, but it has a set of operating procedures	Yes
Outside investment managers permitted	No	Yes	Yes
Fund has its own board of directors	No	No, but has a formal oversight committee	Yes
Annual report required by IRS	No	No	Yes
Gifts to and grants from fund can be anonymous	Yes	Yes	No
JFOM convenes regular advisor/board meetings	No	Yes	Yes
JFOM assists in the development of formal grant and investment policies	No	Yes	Yes
JFOM coordinates site visits as required/needed	No	Yes	Yes
JFOM evaluates grantees	Yes	Yes	Yes
Branded stationary	No	Yes	Yes
Fees assessed are based on fund balance and are used to support JFOM's work with its partner agencies	Yes	Yes	Yes