

## Adath Jeshurun Foundation Value & Impact Pledge

At the Adath Jeshurun Foundation, we strive to create an Adath community that is with you throughout every stage of life. From generation to generation, we perpetuate Jewish values and a deep love of Israel. We maintain our rich history and roots while innovating our approaches to remain relevant and meaningful in our modern day. The Adath Jeshurun Foundation is our promise for a Jewish future. Your bequest or planned gift permanently endows the congregation to secure its well-being for this and future generations.

### What are our goals?

- To empower our donors and congregants to pursue their philanthropic goals and to guide them towards success at every step of their philanthropic journey.
- To open doors to future success at Adath Jeshurun Congregation by growing our permanent funding.

### What do we guarantee?

- To be your confidant, supporter, and advocate when it comes to achieving your philanthropic goals. Whether you want to volunteer, connect us with a friend or family member, give an in-kind gift, or financially contribute, we are committed to being your partner at every step of the way.
- To make every effort to maximize the impact you have on our community and hold our lay leaders, vendors and support staff to the highest standards in pursuit of a Culture of Philanthropy and abundance.
- To act in the greatest interest of our donors.
- To report the impact your philanthropy has on our community.

### What do you get?

- You join nearly 300 other philanthropists as part of the Adath Jeshurun Foundation Legacy Society, and gain access to special events, communications, and opportunities.
- You gain partners who are committed to you throughout your philanthropic journey.
- You get to see your philanthropic kind-heartedness in action, as your funds directly benefit our community, our congregation, and everyone who calls Adath Jeshurun Congregation home.

### What Adath Jeshurun Foundation Provides

Adath Jeshurun Foundation is honored to manage your endowed funds. We provide the following services as part of that administration:

- **Protection and proliferation of assets**
  - The investment of our funds is overseen by the Adath Jeshurun Foundation Investment Committee in partnership with our professional advisor. Our funds are invested with medium risk, prioritizing long-term investment return while allowing ample leeway to mitigate risk inherent to the market.

The mission of Adath Jeshurun Foundation is to endow the congregation to secure its well-being for this and future generations.

- **Fund purpose**

- At the beginning of 2024, the Adath Jeshurun Foundation migrated into fund accounting software to enhance our reporting and adherence to your fund's purpose. Communication with our donors is a top priority, and we encourage you to reach out with any questions, concerns, or ideas as you go on your philanthropic journey.

- **Reporting**

- Reporting the status and impact of your philanthropy is of utmost importance to the staff and Board of Directors of the Adath Jeshurun Foundation. An annual report will feature the up-to-date balance of your philanthropy fund and an explanation of the impact your philanthropy has had on our community during the past year.

- **Responsive Customer Service**

- Without your partnership and commitment, we are unable to achieve our goal of creating a Culture of Philanthropy for our donors, staff, and congregants at Adath and the Adath Jeshurun Foundation. We are committed to returning phone calls and emails within 24 hours, even if only to coordinate a time to be in contact. We will do everything we can to help you answer your questions or start you on the path to a philanthropic future.

- **Support of your community**

- Your philanthropy with the Adath Jeshurun Foundation directly benefits our Adath Jeshurun Congregation community.

- **Transparency on Fee Structure**

- An administrative fee is charged to each endowment fund. This fee funds Adath Jeshurun Foundation's expenses, operations, and work. This fee allows the Foundation to offer competitive salaries and benefits to employees, while providing the tools needed to maximize our value to you as partners in philanthropy.

- **Investment Performance**

- We invest your charitable dollars to grow over time, maximizing support to the organizational areas you are most passionate about.
- Oversight of our investment manager is conducted by our investment committee, which is comprised of volunteers who are members of Adath Jeshurun Congregation. The investment committee is responsible for:
  - Developing a risk-based investment strategy to support the spending policies and needs associated with our Foundation funds.
  - Evaluating and monitoring the performance of our investment portfolios regularly and ensuring compliance with our Investment Policy Statement (IPS).
  - Overseeing the professionals we entrust with providing our investment services.

It is our commitment to you that we strive to maximize your philanthropy, defined as “love of humankind” and “the generous way that community members can advance the cause, and can be expressed in financial gifts, volunteering, community engagement and in many creative forms of big-heartedness”. We look forward to embarking on this journey with you.

**Please reach out to Talor Blustin, Foundation Director, with any questions, at 952.215.3916 or [talorb@adath.net](mailto:talorb@adath.net).**

Date

David Orbuch

Date

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Revised On