



# Congregation Anshai Torah Endowment Fund

*Every gift, of every size, makes a difference*

Congregation Anshai Torah has a rich history spanning more than 20 years. Now, we are working to secure our synagogue's future for the next 100 years. That is why we created the Congregation Anshai Torah Endowment Fund (“the Endowment” or “the Fund”). A strong endowment will allow us to achieve our greatest goals in the coming decades by creating a perpetual income source we can rely on for generations to come. Whether an outright gift today, a gift of life insurance, a bequest in your will, or other gifting vehicles, endowment support ensures a lasting legacy and more importantly, a secure future for a place many of us call a second home.

Each year, our operating budget is supported by funds raised through various appeals, grants, and fundraisers, which are all vital resource streams. And as we move into the next 20 years, and well beyond, we want to ensure that Congregation Anshai Torah remains strong, vital, and able to evolve with the community.

The Anshai Endowment will be housed at the Dallas Jewish Community Foundation (DJCF), which will partner with Anshai to ensure a best-in-class endowment program. All aspects of the Endowment will be overseen by the Anshai Board of Directors in conjunction with the Anshai Endowment Committee. The Endowment Committee will review fund performance and provide regular reports to the Board of Directors.

While the Anshai Endowment is unrestricted, providing maximum flexibility for the shul over the long-term, there are opportunities to make restricted gifts in support of the synagogue. If you are interested in establishing a restricted endowment for Anshai's benefit, we welcome your interest and urge you to speak with DJCF about your options. Additionally, if you are interested in naming a specific program or physical space at Anshai, please contact the synagogue Executive Director.

A gift to the Anshai Torah Endowment is impactful. You can make a difference in the future of our synagogue with the legacy of a planned gift. You can create a charitable legacy supporting an organization that has been, and continues to be, important to you and your family, for generations to come. Your gift, while honoring your legacy, or that of a loved one's, will make a lasting and meaningful difference to our synagogue. Give a gift that lasts forever; ensure that our “second home” continues *l'dor v'dor*, from generation to generation.

## **Ways to Support the Anshai Endowment**

- Bequest in a Will

Identifying a percentage of your estate, specific funds or assets and assigning them to Anshai Torah upon the execution of your will.

- Cash/Checks

- Securities

Donating appreciated securities is simple, cost-effective and a tax-efficient way to make a charitable gift.

- Insurance policy naming Congregation Anshai Torah as a beneficiary

- Real Estate

- Other assets and gift vehicles are available to fund your endowment gift; please contact the Dallas Jewish Community Foundation for more information.

## **Endowment FAQ**

The purpose of the following is to provide general information in response to potential questions from members of Congregation Anshai Torah. Please consult with an attorney, accountant, or tax advisor regarding any specific endowment questions.

**What is an Endowment?** A donation of money or property to a nonprofit organization, intended to last in perpetuity, for the ongoing support and sustenance of the organization. An Endowment ensures the future of Anshai Torah.

**How is it different from other annual financial commitments, such as dues, appeals and fundraisers?** Annual membership dues and participation in appeals and other fundraisers supports Anshai Torah's annual operating budget. Over time, and with your help, the Endowment will grow to alleviate Anshai's annual budget pressure. But, we ask that any Endowment donations be over-and-above your annual commitments as endowment gifts are meant to serve the shul long-term.

**What is the Goal and Purpose of an Endowment?** The goal is to grow the Endowment Fund through gifts and investment growth to a level that allows for annual distributions to Anshai Torah from interest income without touching the principal. The purpose of these annual distributions is to support the operating budget and serve as a source of stability in our funding sources.

**How will the annual endowment proceeds be put to use?** The board and Rabbinat will partner to decide how to deploy the funds in support of the full breadth of the Anshai Torah mission.

**What if I don't have a large sum to donate now; can I still participate?** Yes, the donations to the Endowment are aggregated so that all gifts add to the value of the endowment fund. Gifts of any size are welcome and impactful.

**Who manages the Endowment Fund, and how do I know that my donation is being properly used?** The Anshai Endowment will be housed at the Dallas Jewish Community Foundation, which will partner with Anshai to ensure a best-in-class endowment program. The DJCF offers a small number of vetted investment portfolio options from which our board will choose. The Anshai Board of Directors will have ultimate fiduciary responsibility for all aspects of the Endowment, and the Anshai Endowment Committee will meet regularly to review fund performance and conduct other business associated with the Endowment Fund. Additionally, an annual endowment report will be prepared and presented at the Anshai Torah Annual Meeting.

**Why are we partnering with the DJCF?** The Dallas Jewish Communities Foundation's philosophy is about building relationships and managing assets so that fundholders can turn their "philanthropic objectives into realities." They are our partners in the Jewish community with a shared commitment to the vitality and sustenance of our Jewish, and non-Jewish priorities. The team is made up of highly skilled professionals who work in partnership with a Board of Trustees who are firmly committed to best practice in philanthropy. DCJF manages funds more than \$250M and works with Forbes Top 20 not-for-profit investment advisors to insure the very best decisions for their fundholders. Over the last ten years, DCJF has granted more than \$125M in charitable distributions to a variety of philanthropic entities from arts, education, social welfare, and faith-based organizations to name just a few.

**Can I designate how my gift to the Endowment Fund will be used?** While the Anshai Endowment is unrestricted, providing maximum flexibility for the shul over the long-term, there are opportunities to restrict your gift. If you are interested in establishing a restricted

endowment for Anshai's benefit, please speak directly to the Dallas Jewish Community Foundation staff who will explain your options, including various gift minimums.

**What if I'm interested in naming a program or physical space at the synagogue?**

We welcome conversations about naming synagogue programs and/or spaces within the shul. Please speak with the Anshai Executive Director to discuss options and giving levels.

**If I want to support the Congregation Anshai Torah Endowment through my estate plan (i.e., will, life insurance, retirement assets, etc.), what language should I use/provide my attorney?**

This is an excellent way to support the Anshai Endowment. Please use the following language:

I hereby give, devise and bequeath \_\_\_\_\_ to Congregation Anshai Torah, located at 5501 Parker Road, Plano, Texas 75093, Tax ID Number 75-1704418, to be added to the Congregation Anshai Torah Endowment Fund.

**Will my gift be publicly recognized?** No information about your gift will be divulged without your expressed permission.

**How do I find out more information about the Endowment Fund?** Inquiries can be directed to the synagogue office at 972-473-7718, [info@anshaitorah.org](mailto:info@anshaitorah.org), to a member of the Endowment Committee, or to Meyer Bodoff or Mona Allen at the DJCF:

Meyer Bodoff, President/CEO  
[mbodoff@djcf.org](mailto:mbodoff@djcf.org)  
214-615-5236

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