



A Foundation of  
Philanthropic Funds

Smarter Giving, Greater Impact

We help donors and nonprofits amplify their work and passion

With FJC, philanthropy starts with a blank sheet of paper and an open mind.

Let's talk about what you want to do.

- Engage in ongoing, meaningful philanthropy, without the hassle of setting up your own foundation?
- Donate an unusual or illiquid asset?
- Invest for impact while retaining the liquidity to make grants?
- Involve your next generation in the process of giving?
- Deploy funds in your DAF account as a low-interest loan to a nonprofit you care about?

**Bold ideas don't scare us.** We have a number of fund structures to meet your evolving needs. Have an idea you don't see here? Talk to us about a customized solution!

## Our Values



**Expert**



**Creative**



**Nimble**



**Responsive**



**Reliable**

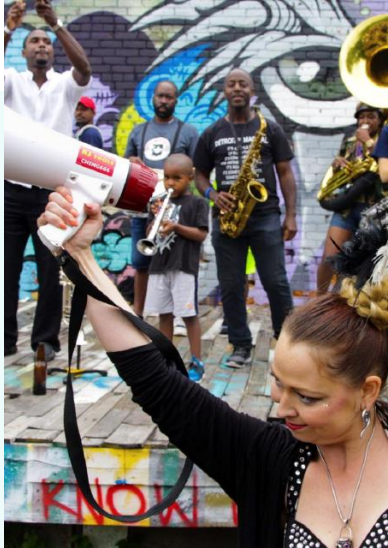
## Donor Advised Funds at FJC

- Avoid the hassle of setting up your own family foundation. We handle the technical, administrative, tax, legal issues related to the philanthropic work you want to do.
- Donors can open an account with as little as \$5,000. There is no minimum amount for additional contributions.
- Donations to FJC are tax deductible. Assets in your account are invested according to your Investment Allocation and grow tax-free.
- Invest for impact through our bespoke Agency Loan Fund, which invests your account in loans to a diversified pool of nonprofit organizations, selected by the staff at FJC.
- Recommend grants to any qualified nonprofit organization through our donor portal.
- In addition to 24 / 7 online access to account information and grant recommendations, FJC offers access to staff by phone during business hours with no call trees.
- FJC charges a flat rate of 1% per annum on the average daily balance of the account, charged quarterly.



## FJC's Agency Loan Fund

- Offered as an investment option, alongside more conventional products (equities, fixed income, cash).
- ALF earns a competitive risk-adjusted return, currently about 4%. Credit enhancement on the pool makes the likelihood of principal loss remote.
- Loans from ALF advance the missions of vital organizations by bridging urgent cash flow needs.
- All loans originated for the ALF are rigorously vetted for credit quality by FJC staff.
- When interest and principal payments are paid, your account grows - amplifying your impact again and again.
- FJC's Agency Loan Fund has advanced over \$280 million in loans to over 200 non-profit organizations globally.



# Want to Retain Your Wealth Advisor?

- Donors typically select their investment allocation from FJC's approved investment options.
- For donors that want to retain a trusted wealth advisor, we offer our Alliance Relationship program.
- Alliance Relationships enable wealth advisors that bring over \$1 million in aggregate client assets to FJC to retain investment advisory services for donated assets.
- Advisors retain ability to track donors' performance and activity through our web-based platform.
- Individual donors with accounts over \$1 million may keep or place assets in preferred alternative investments, hedge funds, and other non-traditional assets.



## Case Studies



*Donation of an illiquid asset (real estate)*

Georgette Bennett and Leonard Polonsky Family Fund worked with FJC to transform a residential property in Aspen, Colorado into a portion of their \$12 million grant to the New York Public Library. The family donated the Aspen property to FJC, which then sold the real estate, generating the proceeds that covered a portion of the grant. The grant to the Library in 2019 will support the creation of Polonsky Treasures Exhibition, a permanent display of rotating items from its extensive research collections, including an original copy of The Declaration of Independence, Christopher Columbus' letter to King Ferdinand II advising him of his discovery in the New World, The Gutenberg Bible, and original sheet music from Beethoven and Mozart.



*A donor makes a customized loan to her favorite nonprofit.*

FJC worked with donor Sandy Wheeler to close a \$100,000 cash flow loan to Brighter Tomorrows, a nonprofit working with victims of domestic violence to provide shelter, counseling and legal advocacy to New York's Suffolk and Nassau counties as well as New York City and the Tri-State area. The process began with Mrs. Wheeler, a longtime donor to Brighter Tomorrows, a nonprofit that faced challenges with state contracts that were typically slow to pay. Within a few weeks, staff at FJC worked with the Wheelers to open and fund a new DAF account, review Brighter Tomorrow's financials, and prepare the legal documents for a bridge loan with terms customized according to the Wheelers' wishes. Among other features, the loan carries no interest.

## About Us

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### What is FJC?

Founded in 1995, *FJC – A Foundation of Philanthropic Funds* is a boutique public charity that offers a diverse menu of philanthropic services to a range of stakeholders. With over \$300 million under management, FJC is primarily a platform for Donor Advised Funds (DAFs). In addition to DAF accounts, its over 1,000 accounts include fiscal sponsorships, collective giving accounts, and many other philanthropic vehicles that enable nonprofit organizations and their supporters to achieve their missions.

### What's unique about FJC?

Innovation is a core part of our DNA. We were born when a group of ambitious philanthropists sought to bring a pioneering level of business discipline and aggressive pursuit of results to the investing side of philanthropy. Today, we continue to innovate, helping donors apply the same level of intention to the investment strategy of their philanthropic dollars as they would to other assets. FJC offers donors unparalleled opportunities to customize their philanthropic approaches to donations, grantmaking and investing.



## Senior Team



**Sam Marks**

**Chief Executive Officer**

Before FJC he was executive director of the New York City office of LISC, a community development financial institution.

Previously, he was Vice President at the Deutsche Bank's Community Development Finance Group, and director of housing development at the nonprofit WHEDCo. Earlier in his career he founded Breakthrough New York, a youth development program. He holds a B.A. from Brown University and a Master's Degree in Public Policy from the Harvard Kennedy School.



**Regina A. Rodriguez**

**Chief Financial & Investment Officer**

Ms. Rodriguez most recently held the position of Director of Finance at the Long Island Children's Museum and previously acted as Controller at the Solomon R. Guggenheim Foundation.

Ms. Rodriguez came to the nonprofit sector following over a decade in various accounting firms, including eight years as an Audit Senior Manager at EisnerAmper. Ms. Rodriguez is a Certified Public Accountant with a Bachelor's Degree in Business Arts from Adelphi University.



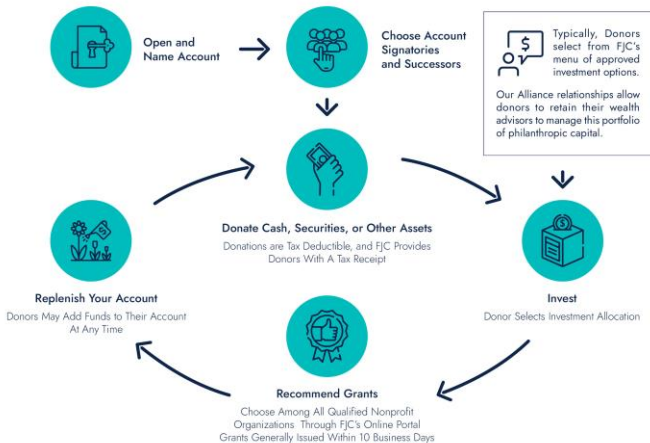
**Meghan Hudson**

**Chief Operating Officer**

Ms. Hudson joined FJC in 2000. Ms. Hudson developed deep expertise in the legal, operational, and financial intricacies of Donor Advised Funds in her previous roles as FJC's Assistant Controller and Director of Financial Services before being appointed COO. Prior to joining FJC, Meghan managed the Babylon Citizens Council on the Arts (BACCA). Earlier in her career she was the Director of the Peggy Mach Gallery. Meghan holds a Bachelor's Degree from Stony Brook University.



## The Process for Donors



## Appendix: Contact Information

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### FJC – A Foundation of Philanthropic Funds

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## Thank You

For more information, or to set up an account, contact

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