



JEWISH FOUNDATION *of* GREATER TORONTO

2025 Annual Report
to the Community

Intentional Philanthropy. Lasting Joy.

At a time when the Jewish community is facing numerous, urgent needs, the expectations of Jewish philanthropists have grown exponentially.

In partnership with the Jewish Foundation, and in response to so many credible needs, fundholders answered the call this past year—teaming up with the Foundation's expert philanthropic advisors to help drive their intentional philanthropy.

We are pleased to present this year's Annual Report, which includes a fiscal summary and some of the ways fundholders have achieved their charitable goals.

This year, under the careful stewardship of our financial experts, we have, for the first time, surpassed the milestone of \$1 billion in assets under management, more than doubling our assets over the last five years. Remarkably, this growth occurred even as fundholders distributed \$300 million over that same five-year period.

Philanthropy is more than a duty. When you give impactfully to the causes that matter most to you, it unlocks lasting joy. In her TED Talk, professor of psychology Elizabeth Dunn explains why giving is one of the best parts of being human. She argues that we have evolved to find joy in helping others, and when we give in a way that reflects our specific passions and values, it amplifies that joy that much more.

On behalf of everyone at the Jewish Foundation, thank you to our trustees, committee members, volunteers, and professionals. Their dedication enables us to continue strengthening the Jewish community. Most importantly, thank you to our donors, without whom none of what we do would be possible.

We look forward to continuing to work with you in the coming year. Let's make your philanthropy more intentional, more impactful, and bring you more joy.



Michael Diamond

Chair, Jewish Foundation



Jack Frieberg

Chair, Jewish Foundation



Sara Lefton

*Chief Development Officer, UJA &
Executive Director, Jewish Foundation*



Our Jewish Future, Powered By You

This past year has once again shown the incredible strength of our Toronto Jewish community—especially when we come together in the face of significant challenges. Through it all, the Jewish Foundation has been a steady and trusted partner.

Whether responding to crises in Israel and around the Jewish world, enhancing security at home, or supporting the day-to-day needs of our community, the Foundation has enabled timely, intentional giving. Its expertise and foresight have made a meaningful difference—both in urgent moments and when it comes to building for the future. None of this would be possible without your extraordinary generosity.

You play a vital role in shaping Jewish life today and securing it for generations to come. We see the full impact of your generosity every day. It's felt here at home, in Israel, and around the world by individuals receiving care and assistance; by families and individuals building their Jewish identities; and by a community that stands stronger and more united because of you.

Thank you for your trust in the Jewish Foundation and your unwavering commitment to our shared future. Your leadership and generosity inspire everything we do. We hope reading this report instils in you a well-deserved sense of pride in what we are achieving together.



Ken Tanenbaum

Chair of the Board, UJA Federation



Adam Minsky

President & CEO, UJA Federation

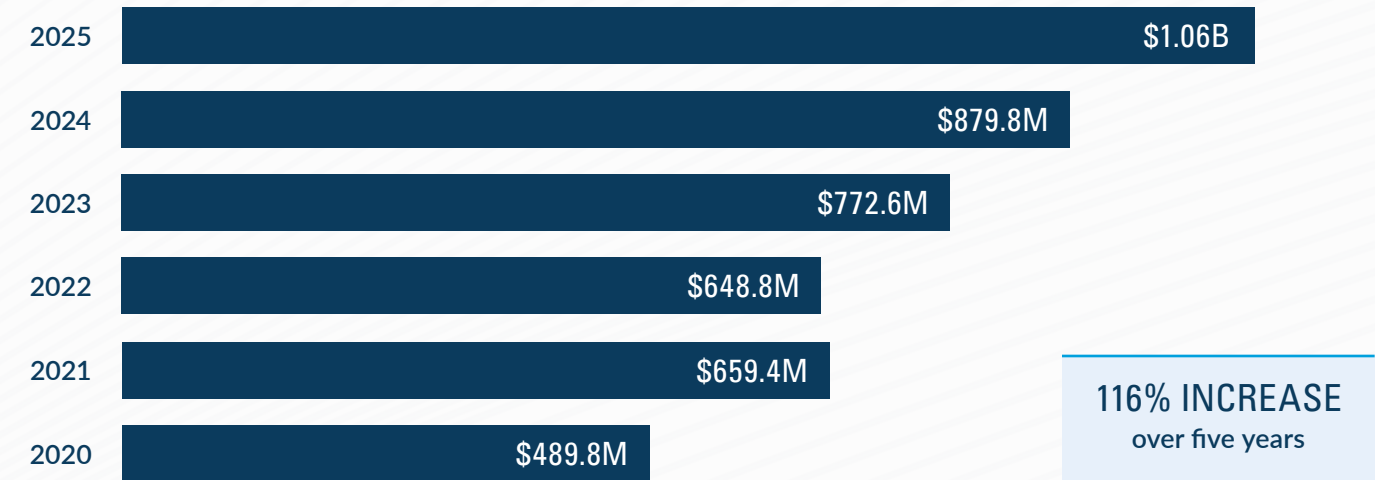


Financial Highlights¹

The Jewish Foundation of Greater Toronto had a record-setting fiscal year ended June 30, 2025.



Assets Under Management



Growth Summary 2024–2025 In Thousands

Assets Under Management - July 1, 2024	\$879, 805
Contributions	150, 516
Grant distributions	(78,749)
Investment return, net of administration fees	106,241
Assets Under Management - June 30, 2025	\$1,057,813 ²

¹ Preliminary unaudited figures.
² Comprised of \$926.4 million Jewish Foundation assets and \$131.4 million managed fund assets, which are funds from other charitable organizations that are held and invested as part of the Jewish Foundation's portfolio.
³ The investment return reported is the net return on the Foundation's pooled portfolio.
⁴ Includes \$2.8 million of deposits to managed funds.
⁵ Includes \$15.3 million of withdrawals from managed funds.

Investment Management & Philosophy

The Jewish Foundation invests its pooled assets in accordance with an investment policy that is designed to balance generating strong returns to achieve the Foundation’s distribution objectives with minimizing risks and preserving our long-term assets.

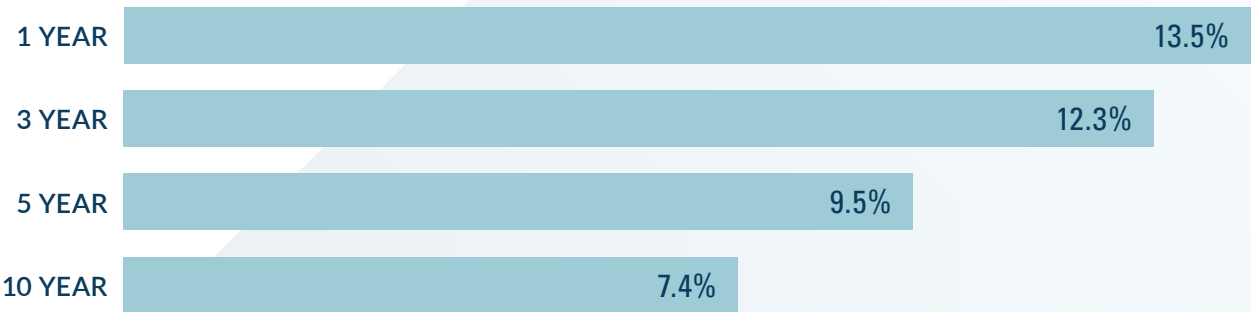
Our investment strategy is guided by the expert oversight of the highly experienced investment professionals who volunteer on our Investment Advisory Committee with the assistance of our external consultant, Mercer.

“The Jewish Foundation’s pooled investment portfolio delivered strong results this past fiscal year. Markets continued to reward innovation and resilience, even as periods of uncertainty tested investor discipline. Against this backdrop, the portfolio benefitted from broad-based strength and thoughtful diversification. While headlines often focused on technology-driven gains or geopolitical-driven volatility, a diversified approach and steady execution proved essential to strong performance in both environments. The Investment Advisory Committee remained focused on long-term objectives, rebalancing as needed, while avoiding reactive decisions to market volatility. We continue this work with conviction, stewarding the Foundation’s assets as a lasting source of support for the future of our community.”

— Stacy Rosen *Chair, Investment Advisory Committee*



Annualized Rate of Investment Return



Grant Distributions

Our fundholders at the Jewish Foundation made a remarkable impact in the community this year, distributing a total of more than \$78 million—the highest in Foundation history. This incredible achievement helped more than 670 organizations, projects, and programs reach their charitable goals.¹

\$43.5M²
Strategic Jewish
Community Priorities

Distributions to support UJA and other organizations, schools, and camps that work to fulfil strategic priorities as defined by UJA Federation of Greater Toronto: countering antisemitism and enhancing community security; strengthening Jewish identity; growing Jewish education; fighting poverty and improving well-being; and building connections to Israel and empowering global Jewish communities.

\$20.2M
Other Jewish
Organizations

Distributions to support Jewish charitable organizations in Canada that are not included in the Strategic Jewish Community Priorities category.

\$15.0M
Non-Jewish
Organizations

Distributions recommended to charitable organizations within the wider Canadian community.

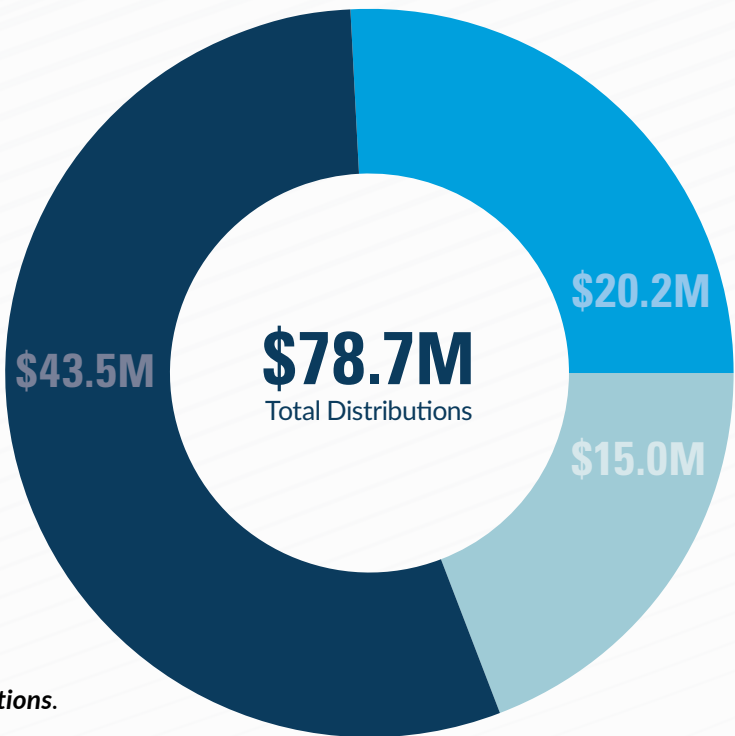
Did You Know?

You can make grants directly to organizations that work to fulfil the strategic priorities. Contact your philanthropic advisor to learn about funding opportunities that align with your philanthropic goals and values.

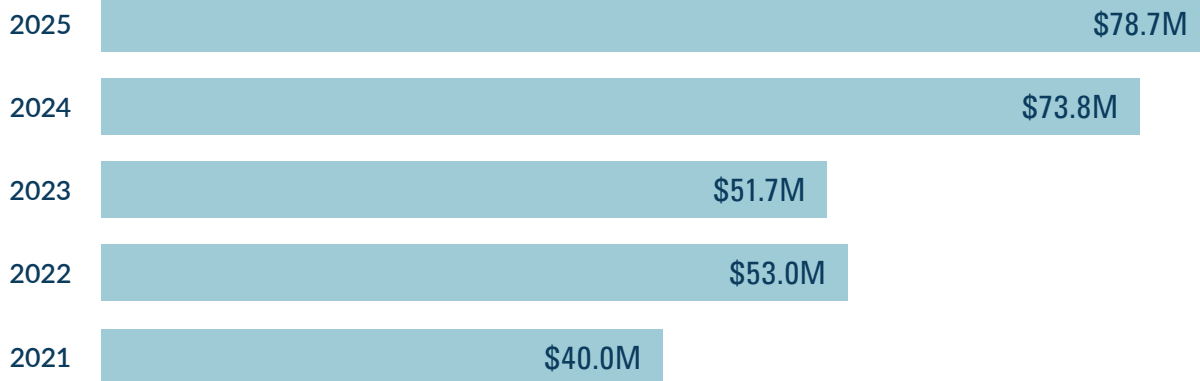
¹ For the fiscal year ended June 30, 2025.

² Comprised of \$14.7 million to UJA's Annual Campaign, \$11.8 million to UJA's Transformational Initiatives (dedicated campaigns that bring together multiple UJA beneficiary agencies to tackle large-scale community challenges that no one agency can address alone), \$12.6 million to UJA beneficiary agencies, and \$4.4 million of strategic grants to other Jewish organizations.

For a complete list of grant distributions, please visit jewishfoundationtoronto.com/about-us/grant-distributions.



\$297.2 Million Distributed Over Five Years



Philanthropy with Purpose

OUR VISION

To strengthen Jewish life locally and globally, today and for generations to come.

OUR MISSION

To provide unparalleled opportunities for donors to make the highest impact in the Jewish community through strategic, expert-guided, and results-driven philanthropy.

Building a Vibrant Jewish Future

The Jewish Foundation of Greater Toronto helps you give to the causes that are most important to you. By leveraging the Foundation's team of philanthropic advisors and UJA's data-driven research and expertise, we help people give based on their values to make a greater impact.

For more than 60 years, people have been opening funds at the Jewish Foundation, benefitting from strong returns and tax savings to make their generosity go even further.

Today, the Foundation proudly stewards more than \$1 billion in current and future assets—planting the seeds for a strong, vibrant Jewish Toronto for generations to come.

▶ Watch Video

Learn how the Jewish Foundation supports your philanthropy, ensuring it is values-driven, data-informed, and impactful.

Why Choose the Jewish Foundation?



You receive expert support in Jewish philanthropy

With access to our team of philanthropic advisors, we help you build a values-driven philanthropic plan that empowers you to give smarter and make the greatest difference in meeting our community's evolving needs.



Your generosity goes even further

With low administration and management fees, more of your money goes to support the causes you care about.



You receive insider access

Backed by data, research insights, and strategic planning from UJA's community planning and resource department, your giving can be better informed, and every dollar can make the greatest difference.



Your gift is recognized

Through the Book of Life and other initiatives, you are recognized in the community for your support and generosity.



Your philanthropy is seamless and impactful

Your donations are pooled and expertly invested by our Investment Advisory Committee and our external consultant, maximizing your giving potential and centralizing your philanthropy.



Your gift can be personalized

You can honour a loved one by establishing a fund in their name to secure their legacy and support the community.



You have multiple ways to give

Our comprehensive menu of giving options provides you with choices that best suit your needs.



You are helping lay the foundation for the future

You are strengthening our community's future by securing a long-term source of funding for critical community initiatives.



You have flexibility

Depending on the structure of your charitable fund, you can distribute as much or as little as you want to registered Canadian charities, in accordance with our granting guidelines.



You can give anonymously

Choosing this option provides a level of privacy and discretion unavailable at a private foundation.

Expert Guidance for Your Philanthropy

The Jewish Foundation of Greater Toronto is *more than just a place to centralize your charitable giving—it's a community that helps you give with heart and intention*. We help turn your generosity into lasting impact.

When you open a fund, you become part of our family of fundholders. From your very first conversation about philanthropy, to effecting change at home and around the world, to laying a foundation for future generations, we can help guide your journey so you can make the greatest difference. Reflecting the depth and diversity of Jewish Toronto, our fundholders are united by their commitment to philanthropy, Jewish values, and the Jewish future.

"In our professional lives we are constantly thinking about how to make meaningful, lasting impact—whether that's in the life of one patient or the direction of a global company. We bring that same mindset to our philanthropy. For us, giving isn't just about writing a cheque—it's about being thoughtful and intentional about the kind of future we want to help build.

From the moment we connected with the Jewish Foundation, we felt understood. Their team offered a rare combination of deep community insight and a genuine passion for helping donors make a difference. With their guidance, we've been able to align our giving with the values we hold dear, and focus our support to areas where it's needed most. **Working with the Foundation has helped turn our intentions into meaningful action—and that has been deeply gratifying.** Thank you to the entire team for all you do!"

— Cliff and Joey Grevler



"What drew us to the Jewish Foundation was the ability to give in a way that's both meaningful and strategic. We can donate now, receive an immediate tax benefit, and then take the time to thoughtfully decide where to recommend those funds. That flexibility was a game changer—it let us align our giving with our values and timing. We rely on the Foundation's leadership and expertise to ensure our fund continues to grow, to maximize the impact of our gifts, and to learn about new opportunities for giving. **It's also become a way to bring our kids into the process—helping them understand tzedakah and what it means to help build a strong Jewish future.**"

— Jay and Mara Klein

"We are active volunteers for many agencies both outside and within the Jewish community. In particular, we have been board members of organizations like the Miles Nadal Jewish Community Centre and Jewish Free Loan Toronto. Our charitable focus has been both volunteering our time and giving financially to causes that are close to our hearts. After attending a PAC seminar, we were motivated to open a donor advised fund with the Jewish Foundation to centralize our giving. **By working with the Foundation, we are supporting the community more effectively and leveraging their expertise to learn about new, valuable causes we can support.** What our community has built together speaks to the core of who we are. It's our privilege to do our part to ensure the continued strength of our community."

— Steven and Cathie Friedman



"One of the shared values we brought to our marriage was our drive to help others however we can. It's why we have worked passionately to support the essential community agencies and programs that are at the core of a thriving Jewish Toronto. When we started discussing how we could leave a legacy beyond our lifetime, we knew the Jewish Foundation was the natural place to do so. **Our relationship with them extends back decades, so there was no doubt in our minds that we could rely on their investment expertise to steward our gift.** Just as importantly, we trust in their expert advice to guide future generations."

— Sonny Goldstein and Betty Rozendaal



Building Your Values-Driven Philanthropic Plan

Partnering with the Jewish Foundation means tapping into a wealth of philanthropic expertise. Our philanthropic advisors work closely with you to develop a personalized giving strategy grounded in research and guided by your core values. With our support, your philanthropic efforts become more intentional, effective, and aligned with the causes that matter most to you.

“Charitable giving has always been part of our family, from generation to generation. It is what we have been taught, and what we are fortunate to be able to do. As our family has grown, so has our fund. This has provided us with the ability to have more of an impact in our charitable giving. The Jewish Foundation team has always been so helpful, knowledgeable, and supportive of our mission. The organizations and projects that we’ve been able to support for over 60 years, in Toronto and in Israel, have all been very meaningful to us. ***We are most appreciative of the kindness and dedication of their philanthropic team, and we look forward to continuing our family’s legacy of giving through our fund. L’dor Va’dor.***”

— Phyllis Flatt



“When my parents passed away, my family and I wanted to establish a fund to honour and carry on their tradition of giving. The team at the Jewish Foundation took the time to understand our family, our values and goals, and helped us create a philanthropic plan for our fund. ***Thanks to their support, we know that when we give we’re supporting causes that honour our parents’ legacy and affect meaningful change in the community.***”

— Dov Zevy

[▶ Watch Video](#)

Watch Dov tell his story in his own words.

Enhancing Your Philanthropic Journey

This year, the Jewish Foundation hosted the first **Exclusive Fundholder Briefing**. This new series is dedicated to delivering data and research insights from UJA's experts directly to our fundholders. Fundholders gathered to learn about how their giving can drive lasting change in some of our key community priorities: enhancing security, countering antisemitism, and strengthening Jewish identity.

At the Foundation, we are dedicated to empowering your philanthropy with personalized guidance—ensuring every grant you make achieves maximum impact and fuels meaningful, enduring change. Events like these are just one of the ways we help support you throughout your philanthropic journey.



Giving with Impact

Fundholders at the Jewish Foundation make a significant impact in the Jewish community, both in Toronto and around the world. By combining your generosity with our strategic insights and a deep understanding of community needs, we help bring your values to life.

Bridging the Employment Gap for Neurodiverse Adults

Developing and Nurturing Independence (DANI) serves neurodiverse adults with a full-continuum of services, including WorkWise and Skills Training & Employment Program (STEP) initiatives that bridge gaps amongst neurodiverse adults by addressing systemic barriers to employment. Backed by decades of industry partnerships, these programs include job-readiness training, strategic placement, and ongoing coaching to ensure employees and employers succeed together. Your support of WorkWise and STEP enables neurodiverse adults to grow and thrive through meaningful employment on their path toward greater independence and well-being.

Fundholder Impact

Thanks to the support of fundholders, DANI was able to launch a major expansion of the WorkWise and STEP initiatives, including establishing a second STEP cohort set to launch in the fall of 2025.

“Our mother taught us that giving isn’t just about generosity—it’s about responsibility. We’re so grateful she chose to leave her legacy at the Jewish Foundation, which helps us give both strategically and seamlessly. From thoughtful advice and project vetting, to helping us understand the impact of our grants, the Foundation makes the entire process easy and meaningful. With guidance from their philanthropic advisory team, this year we chose to support DANI’s WorkWise and STEP initiatives.

These programs reflect our deepest values by offering transformative support to individuals building independent, fulfilling lives. Each act of giving through our family’s fund is how we honour our mom and carry her legacy forward—with heart, with purpose, and with the hope of changing lives.”

— Jake Kazanjian and Sarah Kazanjian



Photo taken at O'Doughs, the first WorkWise employer and first to receive DANI's Inclusive Employer badge.



Increasing Access to Jewish Day Schools

Since its launch in 2021, UJA's Generations Trust Scholarship has been instrumental in reversing day school attrition rates, an accomplishment setting Toronto apart amongst North American Jewish communities. By offering scholarships, the initiative is making day school more accessible to Jewish families across the GTA thanks to the increased affordability. Funding up to four children in a family, this groundbreaking program is helping children build strong connections to Jewish life and paving the way for a new generation of active, proud Jewish community leaders.

Fundholder Impact

Since 2020, 1,461 students have received a Generations Trust Scholarship, with 366 scholarship recipients in 2024–2025.

"Our family was inspired to establish the Generations Trust Scholarship initiative in 2019 out of a deep commitment to making Jewish day school more affordable for more families. It's quite incredible to see how far it has come in just six-and-a-half years—how many more Jewish children are now able to benefit from a day school education. We are proud to have been a part of achieving this important cause and grateful for those families who joined us. Generations

Trust is a long-term investment, and we couldn't do it without the help of the Jewish Foundation's amazing professionals and remarkable volunteers. When it comes to stewarding this gift for the long run and ensuring it is invested meaningfully in our community, we have absolute confidence in the Foundation."

— **Saul and Mira z"l, Henry and Julie z"l,
David and Sarena Koschitzky**





Image Credit: © ROM

Fundholder Impact

During the first six months of its time in Toronto the *Auschwitz. Not long ago. Not far away.* exhibition educated **105,000 visitors, including 18,607 students**, about the dangers of antisemitism.

Supporting Holocaust Education

Our fundholders' generosity and commitment to Holocaust education helped support the installation of the *Auschwitz. Not long ago. Not far away.* exhibition at the Royal Ontario Museum (ROM). As the largest and most comprehensive exhibition on the history and impact of the Auschwitz camp complex, the exhibition features more than 500 historical objects on loan from the Auschwitz-Birkenau Memorial and Museum, as well as 20+ other major institutions and collections. Holocaust education plays a critical role in countering hate in Canada. By teaching others about our shared humanity, we reminded everyone that antisemitism is not just a Jewish issue but a collective one. Helping to facilitate this exhibition allowed Jewish Foundation fundholders to create a more inclusive and accepting society.

"We learned firsthand about the *Shoah* from my father, Saul Reichert, a survivor. But as he and others age and pass away, it's more important than ever that we ensure people understand how the Holocaust was able to happen. That's why we chose to support the *Auschwitz. Not long ago. Not far away.* exhibition at the ROM through our fund at the Jewish Foundation. It is only through understanding the past that we can carve a new path for the future."

— Rochelle Reichert and Henry Wolfond



Strengthening Jewish Identity

In the wake of October 7th, Toronto's Jewish community has experienced a profound reawakening. Thousands of community members have found renewed purpose and pride in their Jewish identity. Jewish Foundation fundholders are playing a key role in supporting this surge of connection, helping to fund vital programs that strengthen Jewish identity. You are enabling day schools, camps, and community initiatives to meet growing demand and welcome more individuals and families seeking connection. From large-scale events like the Walk with Israel to intimate PJ Library family gatherings, more people are finding meaningful ways to engage with their Jewish identity. By funding a wide range of programs, fundholders are ensuring that the spark of connection becomes a lasting flame which will light the way for a more united, resilient, and inspired Jewish future.

"Our community is experiencing an unprecedented rise in demand for Jewish experiences, so it's crucial we expand opportunities for engagement. **Thanks to the assistance of Jewish Foundation fundholders, UJA has funded three new junior kindergarten classes and supported the expansion of PJ Library to more than 10,000 Jewish children's books per month.** These, and many other investments, are helping ensure a strong Jewish future."

— **Daniel Held** Chief Program Officer, UJA Federation of Greater Toronto



"We **MUST** stand up against all forms of antisemitism; we cannot accept any excuses. The most powerful thing we can do in response to the rise in antisemitism is reaffirm our commitments to supporting our community, supporting Israel, and living proud Jewish lives. When we stand up and proudly say 'we are here,' we are honouring our parents, all four of whom were Holocaust survivors, and building a better world for our children and grandchildren. **Our gift in support of building Jewish community connection, pride, and resilience proclaims that we are here,** and our community will remain strong far into the future."

— Morris and Sarah Perlis



Taking Action for Israelis

Jewish Foundation fundholders have been a leading force in backing projects that support Israelis within affected populations as they continue to recover from the aftermath of October 7th. Your support is bringing healing to victims of terror, trauma care to shattered communities, and vital preparedness to vulnerable regions. By investing in emergency response, mental health programs, and the education of tomorrow's leaders, you're not just aiding recovery—you're helping to shape a stronger future. Your support is helping affected Israelis reclaim a sense of safety, strength, and hope.

"Our parents, Evelyn and Sam Librach z"l, had a deep commitment to the Jewish community and Israel, and wished to create a legacy that would support Israelis in their most urgent times of need. Through their fund at the Jewish Foundation, and with the guidance of our philanthropic advisor, our family has developed a process to review critical priorities each year with the support of UJA's team on the ground in Israel. This year our family is supporting a program focused on the rehabilitation of Israelis injured by acts of terror. One of the most meaningful aspects of working with the Foundation is the impact reporting we receive—it provides us with meaningful information about the gifts we make and helps us give with both intention and heart."

— Bonnie Fish, Clifford Librach,
Mark Librach, and Richard Librach



Fundholder Impact

Thanks in part to our fundholders, tens of thousands of Israelis impacted by terror have accessed rehabilitation services to help rebuild their lives.

Investing in Sustainable Financial Stability

For more than a century, Jewish Free Loan Toronto (JFLT) has offered members of the Jewish community interest-free loans. For individuals and families navigating challenging times, this direct and dignified support is a way of investing in their futures and building lasting financial stability. Supporting four categories of loans—basic needs, post-secondary tuition, fertility and adoption, and Jewish programs—JFLT has a 99% repayment rate, and every dollar repaid is lent again to further strengthen the Jewish community.

Fundholder Impact

Jewish Free Loan Toronto currently holds more than **1,500 active loans, totaling \$7.5 million, helping support individuals and families' journeys toward financial stability and self-sufficiency.**



"It's important that when we make grants through our fund at the Jewish Foundation, they promote sustainable, lasting change within the community. We chose to support Jewish Free Loan Toronto because their model aligns with those values—offering dignity, opportunity, and long-term benefit. Not only will our grant help empower the people who receive those funds, it will create a positive ripple effect as the money is repaid and lent again and again. ***This isn't just about funding a project, it's an investment that will have impact far beyond our initial donation.***"

— Leslie and Nir Orbach

If you are interested in supporting any of these high priority community initiatives, please contact **416-631-5703 | jewishfoundation@ujafed.org.**

Philanthropy for the Future

Long-term philanthropy is crucial to ensure support for the future of a strong, vibrant Jewish community. Whether you endow a permanent fund or establish a planned gift to give back to Jewish causes after you pass, your commitment to a strong Jewish future helps ensure our community can prosper for generations to come.

"I strongly believe in the long-term value of the Jewish Foundation, as it supports the initiatives that my family and I want to see remain strong for years to come. I have made the Jewish Foundation the beneficiary of my RRIF, and the tax benefits are immense. ***I am a proud Jew and I feel the Jewish Foundation is the best place to fund the future of a strong Jewish community—in Toronto, in Israel, and wherever help is needed.*** I shall also be substantially funding the Federation on a continuous basis."

— Irving Himel



Making a Promise

The Jewish Future Promise is a worldwide movement dedicated to inspiring Jews of all backgrounds to morally commit that at least half of the charitable contributions they leave in their estate will support Jewish and/or Israeli charitable projects. Whether you leave \$10 or \$10 million, making this commitment helps to ensure our collective Jewish future.

"I was shaped by a legacy of courage, resilience, and unwavering Jewish pride. My mother, Elise Kalles, a hidden child during the Holocaust, built a thriving real estate sales career from nothing. My father, Harvey Kalles, founded Harvey Kalles Real Estate in 1957. A powerful reminder of what can rise from hardship. Knowing what people are capable of building despite the tragedies they have faced fuelled my lifelong support for our community, and it's why I passionately signed and committed to the Jewish Future Promise. ***It's more than a pledge—it's a call to secure our people's future.*** It is an opportunity to initiate a crucial conversation with our children. Together we can build lasting legacies and ensure a vibrant Jewish future for generations to come."

— Michael Kalles



Sign Today

Sign the Jewish Future Promise.

Support for Generations to Come

UJA Legacy Gifts and Lion of Judah Endowments (LOJE) are permanent endowment funds that ensure your gift to UJA's Annual Campaign supports the programs and services you care about in the Jewish community in perpetuity. Automatically distributed every year and indexed to inflation, these gifts are a hassle-free and impactful way to perpetuate your annual giving.



"Creating a Lion of Judah Endowment through a life insurance gift was my way of turning a simple gesture into something deeply powerful. It was easy to arrange and surprisingly affordable, yet its impact will echo far beyond my lifetime. **Each year, my gift to UJA Women's Philanthropy will live on—supporting the community I love and believe in. For me, this isn't just about dollars, it's about legacy—about standing proudly as a Jewish woman committed to tikkun olam.** I wanted to show my children and grandchildren that one act of giving can help sustain Jewish life for generations. This endowment is my voice, my values, my heart—carried forward. It's a quiet promise to the future, that our community will be strong, vibrant, and cared for. And it brings me profound joy to know that I've helped write the next chapter of our shared story."

— Shelley Richler

"Every day, Sol and I feel the depth of our shared values—rooted in the sacrifices of our parents, who survived the Holocaust and rebuilt their lives here in Canada. We know firsthand how vital community support was to their healing and success. **Now, as the next generation, we have been blessed with the privilege they never had. Leaving a bequest in our wills is our way of turning that privilege into purpose, so that the Jewish community that nurtured our families can continue to thrive.** We want our children and grandchildren to understand that *tzedakah* isn't just a value—it's action. Our legacy must be more than words; it must live through tangible change. In this way, we teach that what has been given to us carries with it the responsibility to give forward, with open hearts and generosity."

— Goldie and Sol Wassermuhl



Fundholder Impact

Distributions from UJA Legacy Gifts and Lion of Judah Endowments account for approximately 10% of contributions to UJA's Annual Campaign. Each year before fundraising begins, UJA's community priorities are guaranteed almost \$7 million thanks to these funds.

Guide to Giving

The Jewish Foundation offers many ways to make charitable giving easy and part of your larger financial and tax planning strategy. Some allow gifts to be made today, while others help to plan for the future. The following are just some examples of ways to give.

GIFTS FOR TODAY



Cash, Cheque, or Credit Card

These are some of the simplest ways to give and are accompanied by a charitable tax receipt to reduce the total amount of tax payable in the year.



Flow-Through Shares

After you purchase these shares, they are donated to the Jewish Foundation. Then, the Foundation sells the shares to a pre-arranged buyer. This methodology can significantly reduce the after-tax cost of giving via tax deductions and/or tax credits, making your charitable dollars go further.



Publicly Traded Securities

These include mutual funds, segregated funds, and securities that are traded on a designated exchange. They can be transferred in-kind to the Jewish Foundation, after which you will receive a tax receipt based on the fair market value of the shares and eliminate paying capital gains tax.



Private Company Shares

These are transferred to the Jewish Foundation, at which point the shares undergo a fair market valuation and are redeemed for cash. You receive a tax receipt based on the fair market value of the shares and pay capital gains taxes on any gain instead of potentially paying deemed dividend taxes at a higher rate.

GIFTS FOR TOMORROW



Bequest in a Will

A gift in your will may indicate a specific donation amount, a residual percentage of your estate, or specific assets, such as publicly traded securities. These gifts qualify for a charitable tax receipt to reduce taxes payable by your estate in the year of death.



RRSPs, RRIFs, and TFSAs

Designate the Jewish Foundation as the beneficiary of your RRSP, RRIF, or TFSA. Your estate will receive a charitable tax receipt to reduce the amount of taxes payable upon death.



Life Insurance Policy

There are two ways to gift a life insurance policy to the Jewish Foundation:

A new or existing policy. Designate the Jewish Foundation as owner and beneficiary of a new policy, or transfer ownership of an existing policy and receive charitable tax receipts for the ongoing premium payments.

Beneficiary gift. Designate the Jewish Foundation as beneficiary of the life insurance policy. Your estate will receive a charitable tax receipt at the time the benefit is paid out.

There are many options available for you to contribute to your fund. Contact us to find the way that best suits your needs:
416-631-5703 | jewishfoundation@ujafed.org.

2025 Book of Life

This year, we welcomed more than 900 guests to our largest-ever Book of Life Celebration. Together we honoured 20 new inductees for leaving a legacy at the Jewish Foundation and helping build a stronger future for our Jewish community. The event featured keynote speakers Rabbi David Wolpe and Jonah Platt, who engaged in an inspiring conversation about Jewish legacy, community, and building a foundation for a strong Jewish future.

"The Book of Life is our community's way of celebrating the remarkable commitments and legacies of our inductees. ***The stories they chose to share—those of their personal journeys and the inspirations behind their philanthropy—are each a window into the values that have shaped our community.*** We are honoured to have served as chairs of the Book of Life for the past two years and we hope that by sharing these stories, the values they exemplify will live on."

— Judy and David Engel *Chairs, Book of Life*



"As fundholders at the Jewish Foundation, we are grateful for the opportunity to give back. We are fortunate to be in a position to support many causes through our fund. ***We are proud that our children and grandson, Sawyer, are growing up with the value of tzedakah.*** We are committed to sustaining our Jewish community for future generations because it is ours to protect and preserve."

— Mindy and Steven Shinoff

[i View Photos & Stoires](#)

See more photos from the evening and read the inductees' stories.

For more information about how you can leave your own legacy—and to include your story in the Book of Life—please contact **416-631-5703** | jewishfoundation@ujafed.org.



BOOK of LIFE

CELEBRATION 2025

2025 BOOK OF LIFE INDUCTEES

Naomi Azrieli

Renee Bleeman and Ron Bernbaum

Roy and Ronna Birnboim Family

Tali and Barry Burstein

Farla Efros and Mike Moyal

Debbie Elman and Sloan Levett

Karmit and Gilad Epstein

Jamie Golombek

Cheryl and Mark Grammer

Mardi and Haim Hirshberg

The Jewish War Veterans of Canada

Shelley and Norman Levine

Lisa Lewis

Evelyn and Samuel Librach z"l

Jonah Mayles

Leslie and Nir Orbach

Jeanette and Colin Podolsky

David z'l and Dorothy Samuel

Mindy and Steven Shinoff

Roseline and Willy Tencer



Professional Advisory Committee (PAC)

The Professional Advisory Committee (PAC) of the Jewish Foundation of Greater Toronto consists of leading lawyers, accountants, and financial professionals who work to integrate philanthropy into their professional practices. The Foundation's PAC members provide their clients with a comprehensive understanding of the important role charitable giving can have in their financial and estate plans, and how the Foundation can help support both meaningful and tax-efficient philanthropy.

"It's been my privilege to be part of PAC for more than 10 years, and I am honoured to chair the committee. Now more than ever, we're seeing a growing motivation among individuals to give back. By working with PAC, this phenomenal group of professionals are laying the groundwork for supporting their clients' philanthropy, backed by the guidance and expertise of our philanthropic advisors. We all can make a difference in our community, we just must be willing to take the first step. If you have not yet talked to your professional advisor about how to achieve your family's charitable goals, now is a great time to begin that discussion."

— **Saul Plener** *Chair, Professional Advisory Committee*



Each year, PAC holds educational seminars for professional advisors covering topics of interest and highlighting the benefits of integrating philanthropy into their practices. These events also provide networking opportunities for like-minded professionals. This year we expanded our network of advisors by launching two new events targeted at young professionals and female advisors. These initiatives offered attendees a chance to connect further with the Jewish Foundation through more audience-relevant programming, networking with advisors with shared experiences, and building mentor/mentee relationships.

[!\[\]\(528cbe9ac1a51f0d9458cf024e824c0c_img.jpg\) Watch Video](#)

Hear from Sloan Levett, a professional advisor, on how he integrates his clients' philanthropic values into their financial plans by partnering with the Jewish Foundation.



PROFESSIONAL ADVISORS AWARD OF EXCELLENCE RECIPIENT: MARNI PERNICA

Each year, the Jewish Foundation awards one professional advisor in our community with the Award of Excellence, which recognizes outstanding contributions to the Jewish Foundation and exemplary efforts as a role model for other advisors.

The 2025 recipient is Marni Pernica, a partner at Aird Berlis LLP, the co-practice group leader of the firm's tax group and estates and trusts group, and a member of the estates and succession planning group. In these roles, Marni offers thoughtful and effective planning for clients ranging from young families just starting out to multi-generational families looking for effective ways to transition assets to the next generation.

"Given the challenges of the past few years, the importance of focusing on Jewish philanthropy has only grown for me. As part of these efforts, I have been fortunate to truly get to know this community and seeing so many eager to support it has been deeply inspiring. Receiving this award is not just a recognition of my efforts, but of the many individuals and families I have worked with who have chosen to trust their philanthropy with the Jewish Foundation. It's a meaningful sign that I'm helping to identify opportunities and drive important conversations. Today, passing down these values is more vital than ever."

— Marni Pernica 2025 PAC Award of Excellence Recipient



To read our Giving Advice Newsletter, please visit jewishfoundationtoronto.com/professional-advisors/giving-advice.



Jewish Foundation Leadership

We are incredibly grateful to our trustees and committed volunteers. Your time, dedication, and expertise help us to build the foundation the future of Jewish Toronto will grow upon.

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Meet the Team

Meet the amazing people who help make our work possible.



Contact us today

for more information on what we can do together.

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