



30th Annual Professional Advisors Seminar

SEPTEMBER 19, 2025

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Welcome to the 30th Annual Professional Advisors Seminar

Dear Professional Advisors,

As leaders of the Dallas Jewish Community Foundation (DJCF) and Southwest Community Foundation (SWCF), we are delighted to welcome you to the 30th Annual Professional Advisors Seminar.

For three decades, this seminar has served as a cornerstone of our commitment to education, collaboration, and community-building among the region's most respected financial, legal, and philanthropic professionals. Whether you are joining us for the first time or have been part of this journey from the beginning, your presence today reflects a shared commitment to excellence and ethical stewardship in advising clients on charitable giving and legacy planning.

This milestone year is not only a celebration of longevity, but also a testament to the power of partnership. Together, we have helped families and individuals contribute millions to the causes they love. We've collaborated in shaping meaningful legacies that provide perpetual support for our community institutions, gifts as unique and complex as the individuals we serve. We are honored to continue fostering dialogue around best practices, emerging trends and the values that inspire our work.

We are especially excited to present the Meyer L. Bodoff Memorial Award to Lisa R. Newman. A seasoned and trusted estate planning and probate attorney, Lisa has been one of DJCF/SWCF's strongest advocates and has served as the Chair of the Board, as well as on countless Foundation committees. She currently chairs the Professional Advisory Committee and is the founder of our Supporting Women Attorneys Network (SWAN). Not only has she introduced many of her clients to DJCF/SWCF for guidance and services around charitable giving, but countless of these referrals have opened funds, be they donor-advised funds, endowment funds, or scholarship funds. She has played an integral role in the growth and success of DJCF/SWCF.

We extend our deepest gratitude to the Professional Advisor Committee, the dedicated staff of the foundation, our generous sponsors, and our speaker, Paul Caspersen, who brings insight and inspiration to this year's program. Thank you for being part of this special occasion. We look forward to learning with you, celebrating with you, and continuing to build a future rooted in generosity and purpose.

Sincerely,

Mike Weinberg
Chair, Board of Trustees
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Megan Hyman
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DJCF/SWCF partners with professional advisors to create charitable-giving solutions that meet their clients’ needs.

DJCF/SWCF can help remove the complexity in charitable giving. Just as you help your clients, we can help you. For more information:

- | | | |
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Meyer L. Bodoff Memorial Award of the Dallas Jewish Community Foundation

The Meyer L. Bodoff Memorial Award is given annually at the DJCF/SWCF Professional Advisors Seminar to an advisor who has been an outstanding partner to the Foundation. Award recipients have:

- Served as advocates and ambassadors for DJCF/SWCF
- Referred clients to DJCF/SWCF
- Held leadership positions within DJCF/SWCF

We’re honored to announce this year’s recipient of the Meyer L. Bodoff Memorial Award of the Dallas Jewish Community Foundation, Lisa R. Newman.

Lisa Newman has been serving estate planning and probate clients for more than 30 years. With a dual-focused practice, she helps individuals navigate every phase of estate planning while also guiding families through probate matters with clarity and care.

Lisa gravitated toward estate planning because of her desire to help people make meaningful—yet often difficult—decisions during sensitive times. “Transitions can be difficult, so I offer guidance that allows my clients to move efficiently and effectively through this phase,” she says. “I have the unique opportunity to assist in a way that can alleviate stress and help my clients create meaningful legacies.” Lisa completed her Bachelor of Arts in Political Economy from Tulane University and went on to complete her Juris Doctor from Penn State’s Dickinson School of Law, and her Master of Laws (LL.M.) in Taxation from Georgetown University.

Lisa has been a longtime supporter of the Foundation and is a Life Trustee. She has also served as Chair of the DJCF/SWCF Board and on many Foundation committees. Known for her approachable style, Lisa provides steady guidance that allows her clients to feel confident and at ease. She grew up in Dallas, has been married to Jeffrey Kaplan for more than 25 years, and is the proud mother of a daughter.

Her work has been widely recognized. Super Lawyers Magazine named Lisa a Texas Rising Star in 2005, and she has been named a Texas Super Lawyer every year from 2019–2025. She has also been honored by D Magazine as a Best Lawyer in Tax, Trusts & Estates in 2016, 2019, 2021, 2022, and 2023.



This Award has been generously endowed by the Stanford M. Kaufman Family Fund of the Dallas Jewish Community Foundation. Meyer L. Bodoff served as President and CEO of DJCF/SWCF for 12 years. He saw the Foundation through significant change and growth, always guided by his desire to leave the world a better place than he found it. The Meyer L. Bodoff Memorial Award honors the fact that he did just that.

DJCF/SWCF Professional Advisory Committee

The Professional Advisory Committee of DJCF/SWCF is composed of professional advisors from many disciplines within the industry.

Among its many mandates, the committee serves as representatives of the Foundation to other professional advisors and their clients. It reviews, plans, and evaluates our annual Professional Advisors Seminar, as well as mentors professional advisors in all aspects of charitable giving.

This trusted team of volunteers serves as an invaluable resource for our staff, Board of Trustees, and other committees of the Foundation.



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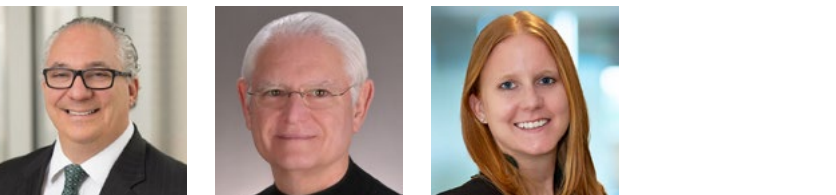


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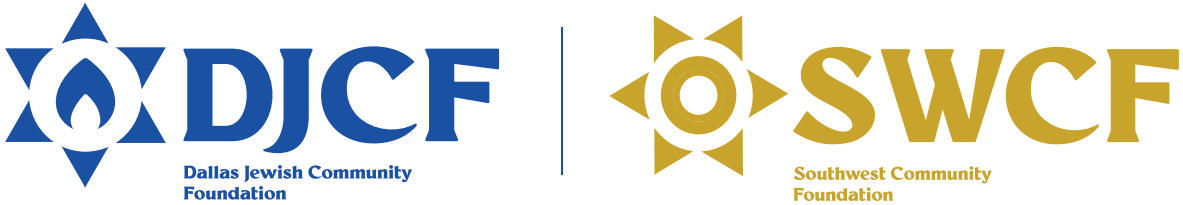


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We believe that our community improves when more people invest more in it. We offer vehicles to simplify charitable giving for donors and to help nonprofit agencies thrive.

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Donor-Advised Funds

- Simplify charitable giving
- Support nonprofit agencies through grants
- Offer tax deductions
- Can accept complex assets*
- Provide opportunity for anonymous giving

Endowment Funds

- Support causes in perpetuity
- Can support scholarships or specific agencies
- Offer tax deductions
- Can accept complex assets*

FOR NONPROFITS

Agency Funds

- Offer low-cost, high-value investments
- Include educational opportunities for agency leadership, both staff & lay

**Examples of complex assets include real estate, retirement savings, physical assets, and mineral interests.*

DJCF
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SWCF
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Year-Round Programs



SWCF Advisor Roundtable

SWCF Advisor Roundtables are offered as a benefit to sponsors of the Professional Advisors Seminar. They provide an opportunity to learn and network over lunch.

UPCOMING SWCF ADVISOR ROUNDTABLES

2025	Nov. 11	Life Settlements: Creating Value out of an Existing Life Insurance Policy - Todd Healy, C3 Financial Partners
2026	Jan. 21	Advisor Happy Hour - Sponsored by Northern Trust
	Feb. 17	From Fundraiser to Professional Advisor and Back: Lessons Learned in Philanthropy - Kerri Lai, Dallas Symphony Orchestra
	May 14	Meadows Collier & Reed - Jana Simons



Supporting Women Attorneys Network (SWAN)

SWAN connects female attorneys around estate planning and related topics. Every other month, SWAN provides an opportunity for attendees to learn and network. It is offered at no cost to attendees.

UPCOMING SWAN LUNCHES

2025	Sep. 25	Nov. 20			
2026	Jan. 21	Advisor Happy Hour			
	March 26	May 28	July 30	Sep. 17	Nov. 19

For more information about the SWCF Advisor Roundtables or SWAN, please email Risa Gross, Director of Impact at rgross@southwestcf.org.

DJCF/SWCF Investment Committee

At DJCF/SWCF, we believe that investing in our community today creates a brighter tomorrow. Core to our mission is to support sustainable growth and positive change by directing investments that drive social good, economic development, and long-term prosperity for all. By partnering with us, your investment doesn't just grow financially, it helps create meaningful change in the lives of individuals, families, and nonprofits within our community.

DJCF/SWCF offers seven different pools to meet the charitable objectives of donors and nonprofit organizations. The Foundation's Investment Committee and independent investment consultants, Graystone Consulting, the institutional consulting business of Morgan Stanley, oversee asset allocation, manager selection and performance monitoring for the pools. Investment returns are reported monthly. All portfolios are invested in alignment with our mission and values.

New this year, fundholders have the flexibility to build their own portfolio allocations by selecting from these models and customizing exposure to asset classes to suit their individual goals and risk tolerance.

We are proud to cultivate a culture of service and responsibility. Our Investment Committee is composed of top investment minds and successful business leaders from our community, all serving on a pro-bono basis. Their deep knowledge and sound judgment are invaluable as we regularly review fund performance, oversee policy objectives, and make strategic decisions. We are grateful to this volunteer committee for their dedication and contributions to our work at the Foundation.

For full transparency, all fund performance details, and investment model information are available on the DJCF website, ensuring our fundholders have the tools and insights they need to make informed decisions. Visit djcf.org/investments to learn more.

DJCF/SWCF remains deeply committed to our fundholders, to working closely with our investment consultants, and to providing outstanding investment models and exceptional service. We thank you for your continued trust and confidence in us as your partner in philanthropy.

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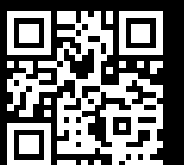
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Attorney Adriane S. Grace is a former estate litigation attorney who has defended numerous estate plans, executors, legal heirs and beneficiaries in our North Texas Probate Courts. Informed by this estate litigation experience, Adriane is able to approach complex family dynamics with resourcefulness and creativity while offering legal solutions custom-tailored to her estate planning client's individual goals.

Adriane S. Grace began her legal career over 12 years ago in Washington, D.C. as an appellate attorney for the Social Security Administration, giving her unique knowledge of complex eligibility rules concerning Social Security and Medicaid benefit programs. She lends this experience to her disability practice where she assists caregivers and supporters with navigating the process of qualifying disabled family members for public benefits, utilizing special needs estate planning tools, and establishing legal caregiving roles through a Texas guardianship.

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The DJCF supports the DFW community through driven involvement, philanthropic expertise, and a passion for connecting DFW's leaders. It is our pleasure to support DFW's premier learning and networking event.



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Recent Cases in Complex Charitable Planning

DALLAS JEWISH COMMUNITY FOUNDATION
Friday, September 19, 2025

Presented by
Paul Caspersen, CFP®, AEP®, MS



TODAY'S Agenda

- Income Tax Primer for Charitable Donations >
- Impact of Section 7520 Rate on Charitable Gifts >
- Gifts of Closely Held Businesses >
- Real Estate >
- Estate Planning Opportunities >

Paul Caspersen, CFP®, AEP®, MS

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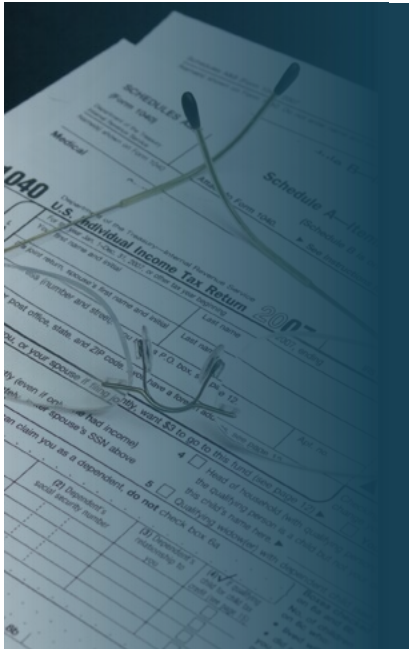
20th
ANNIVERSARY
2005-2025

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- estategiftplanning.com
- paul@estategiftplanning.com

Income Tax Primer for Charitable Donations >





GENERAL Rule for Deductions ✓

IRC §170(a)(1): Taxpayers can deduct charitable contributions made within the taxable year, verified under regulations prescribed by the Secretary of Treasury.

LIMITATIONS Based on AGI ✓

Cash Contributions:
Limit is 60% of AGI (2024-2025), typically 50%.
Non-Cash Contributions:
Limit is 30% of AGI for assets held over a year.

TRUSTS

IRC § 642(c), trusts can deduct up to 100% of their AGI.

OBBBA

Above the Line Contribution Deduction:
\$1,000 (\$2,000 married filing jointly) above the line deduction

Standard Deduction:
The standard deduction, permanently increased under Section 27504 to \$15,750 for single filers, \$23,625 for heads of household, and \$31,500 for joint filers, increased for inflation in future years, likely means that fewer taxpayers will itemize.

Half Percent Haircut on Donations:
For taxpayers who itemize their deductions, OBBBA added a haircut for charitable contributions. They must be reduced by 0.5% of your contribution base.


High Limit for Cash Contributions:
The increased 60% contribution limit for cash gifts to qualified charities is permanently extended.

2/37th Reduction in Itemized Deductions:
The purpose of this provision seems to be to limit the tax benefit you get from contributions and other itemized deductions to 35% not the 37% maximum tax rate. (married filing joint taxpayers, hit 37% at \$751,600)

University Endowments Nailed with New Tax: The excise tax rate varies based on the endowment per student: \$500,000 to \$750,000: 1.4%, \$750,001 to \$2,000,000: 4.0%, and over \$2,000,000: 8.0%.


SPECIFIC Rules and Documentation

Carryover Provisions



Excess contributions can be **carried over to the next five succeeding taxable years** (IRC §170(d)(1)).


Direct Gifts from Businesses



Flow-Through Entity Contributions:
Favorable income tax treatment for S corporations, partnerships, and LLCs.

C-Corporations:
Deduction is limited to 10% of taxable income (IRC §170(b)(2)(A)).

Qualified Appraisal



A qualified appraisal is required for property valued over \$5000. (IRC § 170(f)(11)(C) and Treas. Reg. § 1.170A-13(c))

Substantiation for contributions over \$500,000: Attach qualified appraisal to tax return. (IRC § 170(f)(11)(D) and Treas. Reg. § 1.170A-16(e)(4))

OBBBA Strategies

SALT Cap and Itemization Trends:
This could make itemizing more attractive for some, boosting charitable deductions for those who itemize

“Bunching” is better for itemizers:
A tax-smart way for itemizers to sometimes take the standard deduction.

Make big asset gifts “charitable swap” in the target year and small cash gifts in off years:
Wipe out the capital gain from a portfolio by donating “old shares” of stock and immediately buying new shares of the same stock. Use \$1,000 (\$2,000 married filing jointly) above-the-line deduction in non-itemizing years.

Non-Grantor Trusts:
A trust can reduce its taxable income for charitable contributions without regard to the percentage limitations (20%, 30%, 50%, 60%) of the contribution base, but, in general, only If the trust instrument directs or authorizes distributions of its gross income for a charitable purpose.

- Trusts are not subject to the standard deduction.
- A trust can elect to treat a distribution made during the first 65 days of the following year as if actually made during the prior year.
- Trusts are not subject to the .5% reduction of deductions, including charitable contributions

Private “Family” Foundations

Private Non-Operating Foundation:

Limitations for cash contributions and contributions of appreciated long-term capital gain property to private foundations (IRC § 170(b)(1)(B) and § 170(b)(1)(D)).

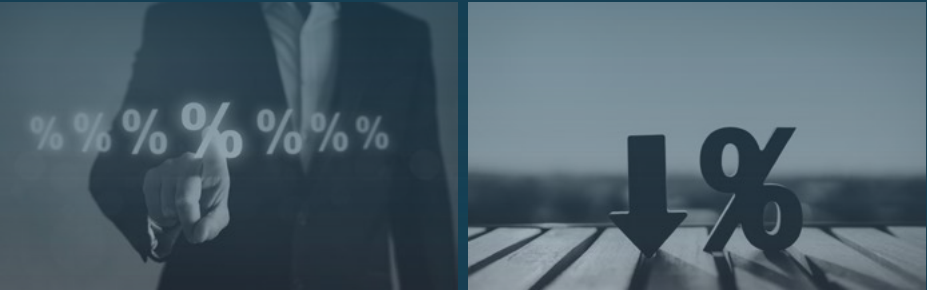
Beware of IRC Section 170(e)(1)(B)(ii)

Taxpayer AGI Limitation

Gifts of cash are deductible to 30% of adjusted gross income. Gifts of appreciated property are deductible to 20% of adjusted gross income. (IRC 170(b)(1)(B)) & (IRC 170(b)(1)(D))

OVERVIEW Section 7520 Rate

- The 7520 rate is used to value annuities, life interests, terms of years, remainders, and reversions for tax purposes.
- It is 120% of the applicable federal midterm rate, published monthly by the IRS.



Impact of Section 7520 Rate on Charitable Gifts



IMPACT ON Charitable Vehicles

- > Charitable Gift Annuities - CGAs
The 7520 rate affects the charitable deduction and the taxable portion of annuity payments.
- > Charitable Remainder Trusts - CRTs
Higher rates result in higher deductions for CRATs.
- > Charitable Lead Trusts - CLTs
Lower 7520 rates increase the value of the charitable deduction for CLATs and RLE's.
- > Retained Life Estates



Typical Complex Assets

- Private Equity
- LLC, LP, or LLP interest
- Non-publicly traded stock
 - C-corp shares
 - S-corp shares
- Hedge fund interest
- Residential real estate
- Commercial real estate
- Foreign-real estate
- Artwork
- Intellectual Property
- Insurance Policy
- Restricted Stock
- Exchange-traded stock options

Gifts of
Closely Held Businesses >

5-STEP PROCESS
OF ANALYZING A CHARITABLE GIFT™

01

WHO IS THE DONOR?
INDIVIDUAL, TRUST, CORPORATION OR FOUNDATION?

02

WHAT IS THE TYPE OF ASSET DONATED?
"LONG" OR "SHORT" TERM GAIN PROPERTY, TANGIBLE, INTANGIBLE OR REAL?

03

WILL THE ORGANIZATION CONSENT TO A RELATED USE OR
IMMEDIATELY LIQUIDATE THE ASSET?

04

WHO IS THE DONEE? A "PUBLIC" OR "PRIVATE" 501(C)3?
DOES THE DONEE MEET THE DEFINITION OF A CHARITABLE ORGANIZATION
UNDER IRC 170(C) AND 2055(A) FOR INCOME AND ESTATE TAXES?
(NOTE: DAF'S DON'T ALWAYS GET THE SAME TREATMENT AS PUBLIC CHARITIES.)

05

WHAT IS THE GIFT VEHICLE?
IS THE DONOR RECEIVING SOMETHING IN RETURN FOR THIS GIFT,
SUCH AS AN INCOME INTEREST OR QUID PRO QUO?

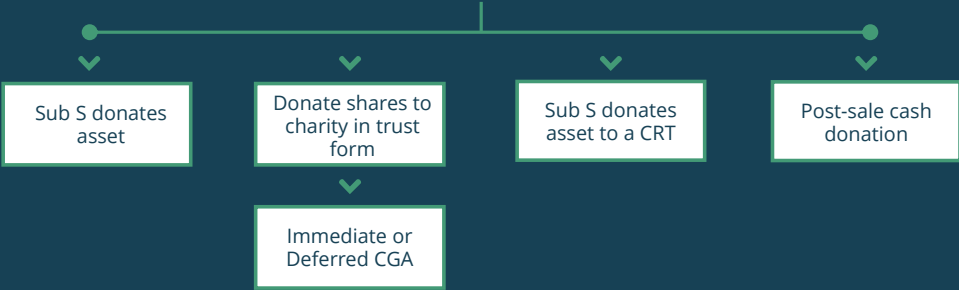
Sub S Corporation

CASE STUDY:
JOE & MONICA
MARRIED COUPLE
NO CHILDREN

- Selecting a direct gift to 3 charities vs. a private foundation
- They also want to explore a life income gift as well
- Acquisition likely by December 2025
- Sub S Corporation (Solar Solutions, Inc.)

UBTI Solutions For Donations of Sub S Stock

- UBTI:
- The sale of the Sub S stock will give rise to UBTI. (unlike limited partnerships) (IRC 512(e)(1))
 - Donation of S corporation stock to a public charity in trust form.
- Solutions:
- Most likely donate to a charity formed as a trust (instead of as a corporation).
 - Can typically get the UBTI under 10%.



Real Estate >



Gift of Sub S stock to a Charity in Trust Form >

Value of donated	Dollars (\$)
S corp stock	1,000,000
Federal tax savings in 37% bracket	370,000
State tax savings in 13.3% bracket	133,000
Total federal and state tax savings	503,000
Taxable gain for trust form DAF	1,000,000
Charitable deduction for trust-form DAF	600,000
Tax paid at 20% trust rate + fee from charity	100,000
Total amount for charitable giving	900,000

Richard’s TOD Deed in West Virginia

CASE STUDY 1: REAL PROPERTY TRANSFER- ON-DEATH

- Richard died in October 2024 owning 120 acres in Jefferson County, WV
- In 2023, he executed a Revocable TOD Deed naming five charities as equal beneficiaries
- West Virginia has adopted the Uniform TOD Act; title vested immediately upon death as tenants in common
- The property is subject to a perpetual conservation easement
- One of the five charities is also the easement holder
- Other co-beneficiaries lacked real estate gift acceptance policies



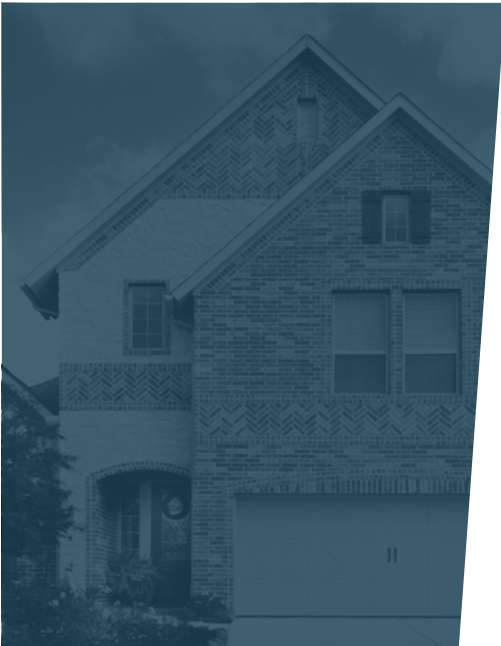


Navigating Risk, Stewardship & Co-Ownership in Charitable TOD Gifts

The property carried additional complexity: a hunting lease, potential environmental exposure, and perpetual easement compliance.

With no executor oversight and no right to disclaim post-transfer, the charities were exposed to risk—and the property was unreachable for creditor claims.

All five charities ultimately deeded their interests to the Dechomai Foundation, which will sell the land and distribute 20% of the net proceeds to each.



Texas Estates Code Chapter 114

Establishes Transfer on Death Deeds (TODDs) in Texas: revocable, nontestamentary conveyances of real property executed and recorded before death.

Preserves creditor rights and encumbrances—beneficiaries inherit property subject to existing liens, and creditors may pursue claims similar to probate assets.

Texas recognizes Lady Bird deeds (also called enhanced life estate deeds) as a common law tool, separate from the statutory TOD Deed (Chapter 114).

Real Estate Donations

CASE STUDY 2: UNMARRIED COUPLE UNDIVIDED INTEREST

- Bob owns 70%, and Mary owns 30% TIC
- \$9m FMV
- Use to be their primary residence but IRC 121 no longer applies.



Real Estate Donations

CASE STUDY 2: UNMARRIED COUPLE UNDIVIDED INTEREST

- Co-ownership and charitable deduction for undivided interest in real property.



Real Estate Donations

CASE STUDY 3:
WIDOW DONATES HER HOME

- appraised at \$7 million (Laguna Beach, CA)
- donates her home, to a national charity while retaining the right to live in it for the rest of her life. AND she receives a monthly annuity from the charity.



Estate
Planning
Opportunities

SECURE Act- Part 2



Real Estate Donations

CASE STUDY 3:
"CHARITABLE REVERSE MORTGAGE" TECHNIQUE

- Combination of retained life estate and charitable gift annuity for significant tax benefits.



THE 5 CATEGORIES OF
Eligible Designated Beneficiaries

- 1 > Owner's Surviving Spouse
- 2 > Owner's Minor Child
- 3 > An Individual Who is Disabled
- 4 > An Individual Who is Chronically ill
- 5 > An Individual Who is Less than 10 Years Younger than the Decedent

Planning has become more complicated by adding five categories of eligible designated beneficiaries who aren't subject to the 10-year rule.



REVIEW OF
Rules for Designated Beneficiaries

- **Rules for designated beneficiaries:
Death before RBD (age 73)**

 - **10-year rule** (§ 1.401(a)(9)-3(c)(3), (c)(5)(i)(B).)
 - **No RMDs during 10-year period**
- **Rules for designated beneficiaries:
Death AFTER RBD (age 73)**

 - **10-year rule** (§ 1.401(a)(9)-5(e)(2))
 - **RMDs during 10-year period** (§ 1.401(a)(9)-5(d)(1)(ii))

CHARITABLE GIVING

By Paul Caspersen & Caleb Knepper

Navigating the Post-SECURE Act Landscape

Optimizing beneficiary and charitable outcomes with testamentary charitable remainder trusts

The Settling Every Community Up for Retirement Enhancement (SECURE) Act, enacted in December 2019, significantly transformed the landscape of inherited retirement accounts. In July 2024, the Internal Revenue Service issued final regulations updating the required minimum distribution (RMD) rules applicable to qualified plans, including Internal Revenue Code Section 401(c) plans, to reflect changes made by the SECURE and SECURE 2.0 Acts. These regulations generally follow proposed regulations released in 2023.

See-Through Trust Challenges

Even though before 2020, all designated beneficiaries could take a life expectancy payout from an inherited retirement plan, many grantors (specifically the parents of the beneficiary) often anticipated that their beneficiaries wouldn't prudently withdraw just the RMD. Therefore, an intervention, such as a trust, required the beneficiary to take only their RMD annually. The SECURE Act significantly altered the landscape for see-through trusts, traditionally favored for their ability to stretch distributions from inherited retirement plans if the only beneficiaries were designated beneficiaries. There are two types of see-through trusts:

Conduit trusts: Treasury Regulations Section 1.401(a)(9)-4(c)(1)(i)(A) defines a conduit trust as one that directs that all distributions from the retirement plan to the trust be paid immediately to the specified beneficiaries.

Accumulation trusts: Treas. Regs. Section 1.401(a)(9)-4(c)(1)(i)(B) says that accumulation trusts differ by allowing the trustee to retain distributions within the trust rather than immediately passing them to the beneficiaries. This structure can provide greater control over the timing of distributions. However, income retained in the trust is taxed at the compressed estate and trust tax rates, reaching the top federal rate of 37% on income over \$13,000 in 2024, which may diminish the tax efficiency.¹

The SECURE Act provides some good news for charities. They can now be named as "blind tier" beneficiaries in accumulation trusts or "second tier" beneficiaries in conduit trusts because they're "disregarded" when voting through the trust to consider which beneficiaries consent. This change alleviates the previous concern that including any "non-person" beneficiary, such as a charity, would subject the entire trust to the 5-year rule, meaning that the retirement plan had to be emptied in five years.

Testamentary CRTs

A charitable remainder trust (CRT) provides for annual distributions to one or more beneficiaries (at least one of which isn't an organization described in IRC Section 170(c)) for a specified period (this can be a term of years up to 20 years or for the life of a beneficiary or multiple beneficiaries).² When the period expires, the CRT assets are distributed to charitable organizations described in Section 170(c).

From left to right: Paul Caspersen is president and founder of Charmed Living Strategies, LLC, an estate and wealth planning firm in Charlotte, NC, and Caleb Knepper is a senior advisor at the Office of Estate Planning at the University of Florida.



30 / TRUSTS & ESTATES / trustsandestates.com / OCTOBER 2024

T-CRUT
Case Study Tax Considerations

➤

Tax-exempt status of CRTs under IRS Section 664(c)

➤

Income in Respect of a Decedent (IRD)

➤

Potential Limitations of “See-Through” Trusts

T-CRUT
Case Study Overview

➤

Beneficiaries: Ron's two sons, ages 60 & 53

➤

Trust Type: Testamentary Charitable Remainder Unitrust (T-CRUT)

➤

Funding Amount: \$1.8 Million

➤

Source of Funding: IRAs and non-qualified annuities

➤

Payout Rate: 6%

March 2025 ACTEC Podcast

“And finally, the best tax idea for IRAs that I have ever seen and I believe in is best for last: the charitable remainder trust, used much less than it should be. A charitable remainder trust, you leave your IRA to it, the IRA goes in totally tax-free. So, the whole account goes into the trust. It pays a fixed income to your family member during life, 5% or more it has to pay.”

-Natalie Choate AKA “The GOAT”

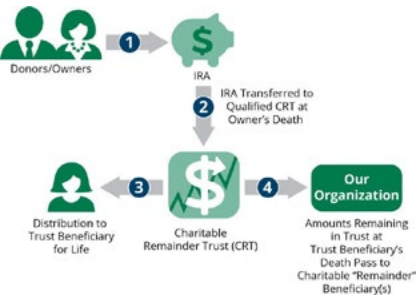
46 | PRESENTATION NOTES

47 | PRESENTATION NOTES

Testamentary Charitable Remainder Trust

“the benefit of the stretch through the CRT may offset or outweigh the loss of the remainder interest.”

Attorney, Bruce Steiner
Trust & Estates Magazine, March 2020



➤ Name the trust as the primary beneficiary of the Donor's IRA

➤ "Dry Trust" Rules

➤ Letter Ruling's 9237020, 9253055

CRT Provisions into a Revocable Living Trust Document

"100% to ABC Charity, trustee of a charitable remainder trust described in Clause X of a trust document executed by me on Month, Day, Year."

The “Dry” Trust

Draft as revocable "fund with \$10" and irrevocable at the death of Grantor. There is no intent that the trustee actually invests the \$10, make payments to the income beneficiaries, or file tax returns.

Create a "Fund" a Qualified CRT Today

Irrevocable, non-grantor trust.
EIN and tax reporting annually.

Assumptions

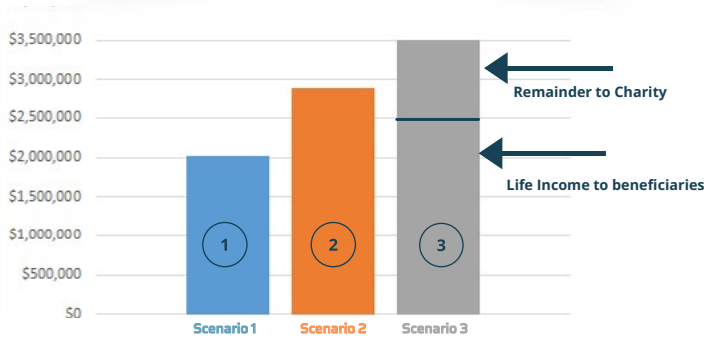
➤ Tax rate: 37% on Lump Sum Withdrawal
Tax rate: 22% assessed ongoing

1 Scenario 1: Inherits \$500K IRA. No rollover to inherited IRA; immediate withdrawal. Amount invested after taxes.

2 Scenario 2: Inherits \$500K IRA. Rollover to inherited IRA, 10-year deferral then withdrawn.

3 Scenario 3: \$500K into Testamentary CRUT. 5% annual payout based on the beginning principal balance.

Rate of return: 7%
Term of Years: 35
Principal: \$500,000



Scenario 1:
Total after 35 years: \$2,024,805
Growth: \$1,524,805
PV (Beg. Yr 1): \$315,000

Scenario 2:
Total after 35 years: \$2,897,986
Growth: \$2,397,986
PV (Yr 10 to Beg. Yr 1): \$498,290

Scenario 3:
Remaining Principal
Total after 35 years: \$999,939
Growth: \$499,939
PV: \$93,657
Lifetime Income
Total after 35 years: \$2,495,565
Growth: \$2,495,565
PV: \$388,237

Recommend the Retention of a Right to Revoke

This ensures the trust is **NOT** a qualified CRT until the grantor/donor's death.

➤ “Solely for the purposes of section 664 and the regulations thereunder, the trust will be deemed to be created at the earliest time that neither the grantor nor any other person is treated as the owner of the entire trust under subpart E, part 1, subchapter J, chapter 1, subtitle A of the Code (relating to grantors and others treated as substantial owners), but in no event prior to the time property is first transferred to the trust.”

Sec. 1.664-1(a)(4)

TODAY'S
Review

Income Tax Primer for Charitable Donations	✓
Impact of Section 7520 Rate on Charitable Gifts	✓
Gifts of Closely Held Businesses	✓
Real Estate	✓
Estate Planning Opportunities	✓
Q & A	✓
Conclusion	✓

Leveraging A.I. in Estate & Financial Planning for 2025 & Beyond

Paul Caspersen CFP®, AEP®, MS





Thank you!

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Paul Caspersen, CFP®, AEP®, MS

Founder of Planned Giving Interactive (PGI), a charitable planning software & consulting organization.

PGI is an affiliate organization to Charitable Solutions LLC, the largest national consulting firm that provides charities with risk management solutions for non-cash donations and charitable gift annuities.

Planned Giving Interactive

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Agenda

- 1 Introduction to AI
- 2 Use Cases of AI and Emerging Industry Tools
- 3 AI Bias, Reliability, and Client Impact
- 4 Oversight and Governance
- 5 Ethical Use of AI, Data Protection, and Compliance
- 6 Q & A

Introduction to AI

Question:

"How do you define AI, and why is it becoming such a critical topic for professionals in our field right now?"

Introduction to AI

Chat GPT: A Deeper Dive

- | | | | | | |
|----|---|----|---|----|---|
| 01 | BRIEF HISTORY
of AI before
November 2022 | 02 | Introduction
of ChatGPT and
its significance | 03 | THE DISTINCTION
between pre and post-
November 2022 AI |
|----|---|----|---|----|---|

AI Nomenclature



ChatGPT

Generative artificial intelligence (AI)

Machine learning

GPT (generative pre-trained transformer)

Natural Language Processing (NLP)

Large Language Model (LLM)

Prompt engineering

*Self-Reflective AI (Meta-Reasoning)

*Advanced Chain-of-Thought (CoT) Prompting

Evolutions of the Web

Web 1.0

connect to information

Web 2.0

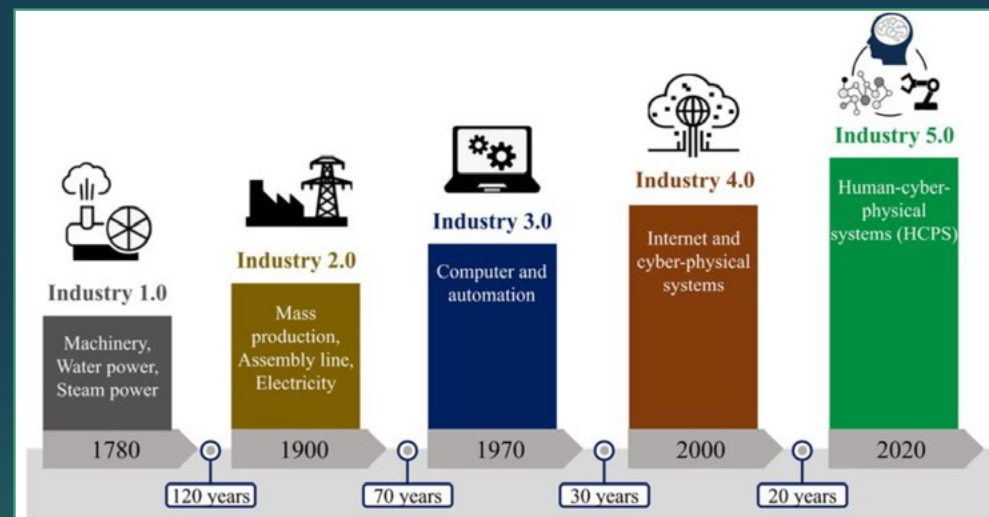
connect to one another

Web 3.0

- Blockchain
- AI
- Metaverse
- Decentralization Defi



The 5th Industrial Revolution






Use Cases of AI & Emerging Industry Tools

Use Cases of AI & Emerging Industry Tools

Question:
"Can you walk us through some practical examples of AI being used in estate planning and charitable giving today – and where you see the most promising tools emerging?"

Use Cases of AI and Emerging Industry Tools

Generative AI	Agentic AI	AI Agents
		
<ul style="list-style-type: none">Generates new contentUses deep learning modelsTrained on large datasets	<ul style="list-style-type: none">Acts autonomouslyRefines its goalsImproves continuously	<ul style="list-style-type: none">Perform tasks for usersMay incorporate both typesInteractive & collaborative

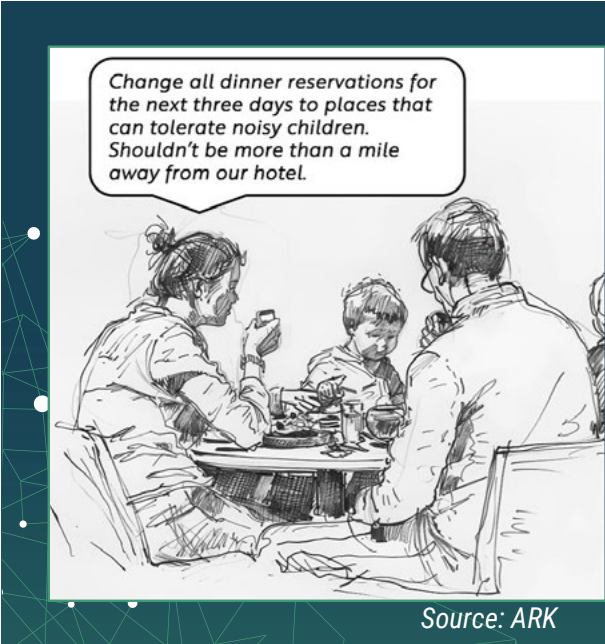
Ethical Framework

ABA Model Rule 1.1 – Competence:
"A lawyer shall provide competent representation to a client. Competent representation requires the legal knowledge, skill, thoroughness and preparation reasonably necessary for the representation."

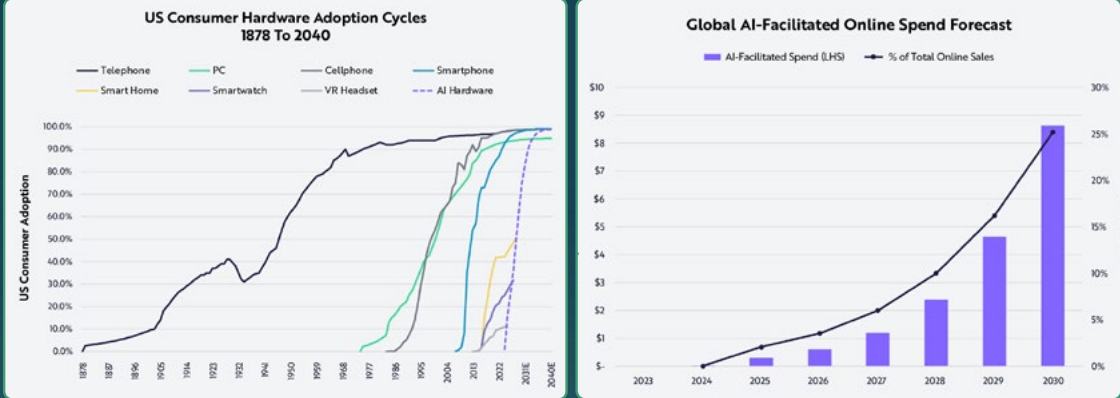
Comment 8 to Rule 1.1:
"To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology."

AI Agents

- Understand natural language queries
- Execute user-specified tasks across the internet
- Adapt continuously based on user preferences.



Consumer Behavior & Forecast



Source: ARK Invest

Living Wills and Health Care Proxies

The Impact of Artificial Intelligence on Living Wills and Health Care Proxies

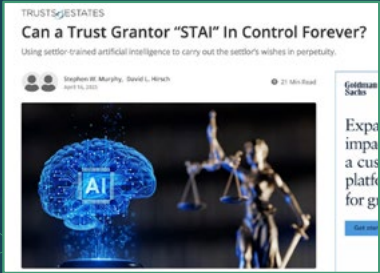
Striking the right balance between AI-driven insights and human judgment ensures comprehensive and compassionate patient care.

Marnin J Michaels, Partner, Baker & McKenzie Zurich
July 30, 2025

5 Min Read



Complex Trusts



Control Gap: Gifts require giving up direct management of assets.

AI Trustee: Train an LLM on the settlor's values & communications to emulate their decisions.

Legal Wrapper: Name an LLC (with a human manager) as trustee, following AI-generated guidance.

Oversight Model: Combine AI decision-making with a human-in-the-loop (HIL) or HOLD framework.

Key Risks: Fiduciary liability, tax implications (IRC §§ 2036/2038), "dead-hand" control and privacy.

Frank™ or Max™ Which is right for you?

PGI | gift planner's workstation™



PGI | gift planner's workstation™

1 Journal of Gift Planning-NCGP & Other Approved Special Contributors

3 Dr. Russell James

5 US Internal Revenue Code, Treasury Regs, Rulings



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A man in a blue suit is standing on a stage, pointing towards a large screen. The screen displays a digital avatar of a man with dark hair, wearing a red sweater over a white collared shirt. The background is dark with red lighting accents. In the bottom left corner, there is a logo for "MORNINGSTAR" and the text "© 2024 Morningstar. All Rights Reserved."

Jump

Search
Sylvia Montgomery

New meeting

Chaves review meeting

Zoom

View meeting

Tue, May 13 at 3:30pm

Sylvia Montgomery Tim Chaves Ashley Chaves

Getting started

Home

Meetings

Upcoming

All past

As presented

Needs action

Active items

Recap emails

Notes & CRM

Follow-ups

Pre-meeting prep

Meeting recap

Ask anything

Analytics

Meeting processed as Client Meeting

Reopen

Financial Planning Meeting with Chaves Family

Exploration of financial plans, income, expenses, and investment planning.

Discussion

The meeting began with introductions, where Tim Chaves shared that he is married to Ashley and they have four children, ages ranging from 8 to 18. Tim expressed a positive sentiment for sitting and talking openly classes with his colleagues while highlighting a personal interest in house and investing.

Sylvia Montgomery, the advisor, transitioned to understanding Tim's financial situation. Tim desires to achieve financial freedom by offsetting work aspirations to slow down work and travel. An important value for him and his wife is supporting their children's college education to avoid student debt.

The discussion then moved to real estate, where Tim mentioned owning a home with a current mortgage, looking to upgrade it eventually while staying in their current area.

In terms of income, Tim works as a software engineer at Qualcomm, earning \$80,000 annually, supplemented by his wife's sales business that brings in an additional \$25,000 to \$35,000 per year. They have a mortgage joint over \$200,000 monthly, with significant discretionary expenses, notably eating out, totaling between \$2,000 and \$3,500 monthly.

Tim shared that he expected higher changes in income or expenses, though he noted macroeconomic concerns such as layoffs in the tech sector. He provided insights into their investment portfolio, mentioning a future value held between \$700,000 and \$750,000 with an outstanding mortgage of \$200,000, a firm IRA with Chaves Growth holding between \$250,000 and \$300,000, and a cryptocurrency investment valued at \$40,000.

On insurance, Tim has a term life insurance policy worth \$1,000,000 on himself and \$500,000 on his wife, but lacks an umbrella policy. The savings include \$30,000 in checking and \$50,000 in savings, intended for liquid assets for emergencies.

Finally, Tim mentioned his desire for retirement planning, aiming for a comfortable lifestyle during his golden years.

Add Note to Contact

Send follow-up email

Follow-up tasks

Sign to Workflow

Saved Tim information on Mercury

Tim is looking for places to put large cash holdings with high yield and FDIC insurance, was interested in Mercury.

To do...

Add annuity to financial plan

Update Tim's financial plan to include the annuity and research its impact.

To do...

Look into mortgage rates

Tim and Ashley would like to determine how large a mortgage to put on their home purchase, depends on rates.

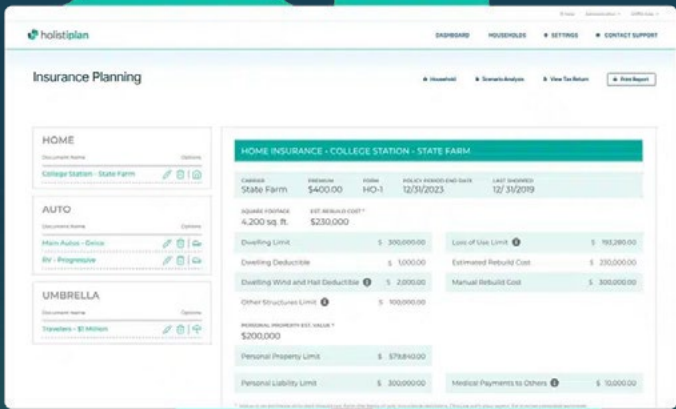
To do...

Account Settings

User Settings

Help

Holistiplan



AI Bias, Reliability & Client Impact

Question:
"How can professionals identify and manage the risks of bias or inaccuracies in AI outputs, and what's the potential impact on clients if they don't?"

1 2 3 4 5 6

AI Bias, Reliability & Client Impact

Ethical Framework

ABA Model Rule 1.6 – Confidentiality of Information:
"A lawyer shall not reveal information relating to the representation of a client unless the client gives informed consent..."

Rule 1.6(c):
"A lawyer shall make reasonable efforts to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to, information relating to the representation of a client."

How Can AI HURT Advisors?



Oversight & Governance

Question:
"What kinds of legislation or regulatory guidance are emerging around AI in estate planning, and how should professionals prepare for those changes?"

Oversight & Governance

AI Legislation

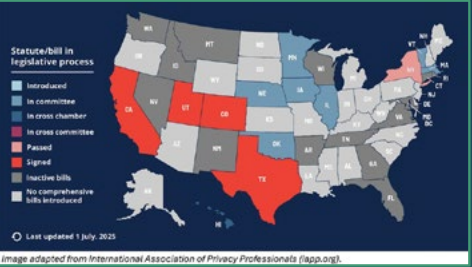
- EU AI Act (2024)
- White House AI Bill of Rights?
 - State and Local
- Internal AI policy development for law practice
- ABA Formal Opinion 498 (2021)

Nathan Chappell, MBA, MNA, CFRE, AIGP • 1st
On a mission to amplify impact through Responsible + Beneficial AI...
[Visit my website](#)
1d •

Last night, in a 99-1 vote, the U.S. Senate struck down a controversial provision that would have blocked states from regulating artificial intelligence for the next decade. The so-called "AI moratorium" was quietly buried in the larger "One Big Beautiful Bill" - and just as quietly removed.

What does this mean?

It means the future of AI governance won't be written solely in Washington or Silicon Valley. It will be shaped in Sacramento, Austin, Albany, and Phoenix. It will be debated in statehouses, community forums, and nonprofit boardrooms.



123456

Ethical Use of AI, Data Protection, & Compliance

Ethical Framework

ABA Model Rule 5.3 – Responsibilities Regarding Nonlawyer Assistance:
"A lawyer shall be responsible for conduct of [nonlawyer assistants] that would be a violation of the Rules... if the lawyer orders or, with the knowledge of the specific conduct, ratifies the conduct... or fails to take reasonable remedial action."

Ethical Use of AI, Data Protection, & Compliance

Question:
"What does ethical and compliant use of AI look like today, and how can professionals stay ahead of emerging standards for data protection and client care?"

Ethics Our Responsibility with AI



PRIVACY



SECURITY



TRANSPARENCY



QUALITY



OVERSIGHT

Skills for the Future

Question:
"What skills will professionals need to develop to stay ahead as AI becomes more integrated into our work?"

1

2

3

4

5

6

Audience Q & A

The Current Landscape

Usurping Humans?


Maximizing AI's Potential

Personalized insights and data analysis

Loss of Technical Expertise

A Useful Tool

Thank You



Use the link access to Frank™ for Advisors
<https://djcf.org/work-with-us/professional-advisors/professional-advisor-tool/>

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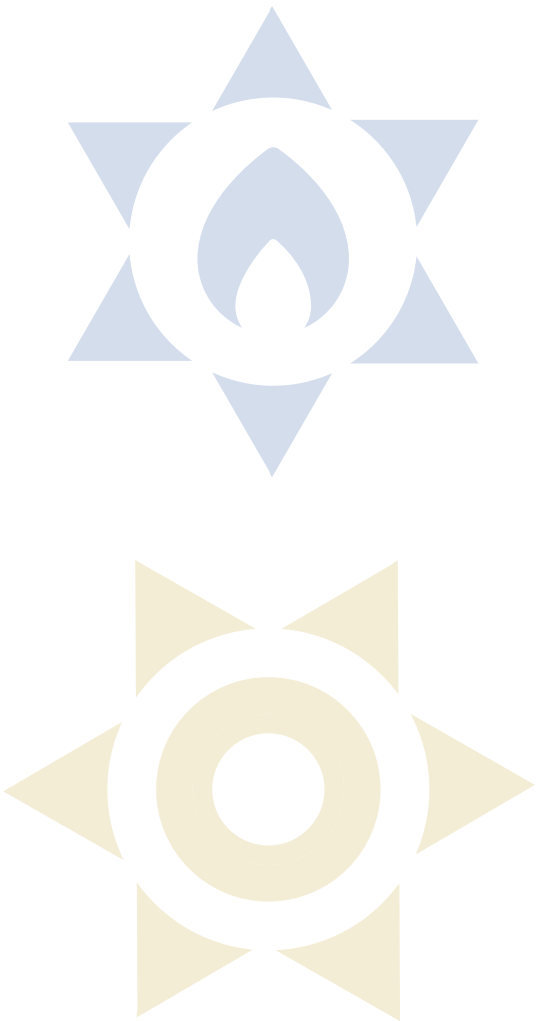
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Our Mission

To be your partner and trusted expert in charitable giving and effective philanthropy by:

- Empowering our community’s charitable vision
- Safeguarding our community’s resources
- Building enduring Jewish legacies

Our Vision

Securing our community’s future by fostering a culture of strategic planning and giving today

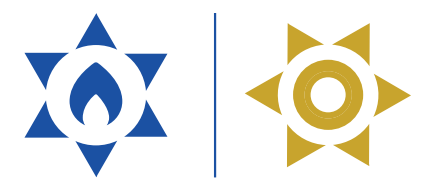
Our Values

Jewish Traditions, Trust, Compassion, Confidentiality, Collaboration, Inclusive Philanthropy, Education

Our Staff

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DJCF/SWCF 2024 - 2025 Fiscal Year Highlights





\$384 MILLION

TOTAL ASSETS UNDER MANAGEMENT (AUM)

Fund Growth:

349

ENDOWMENT AND SCHOLARSHIP FUNDS

591

DONOR-ADVISED FUNDS

370

NONPROFIT FUNDS

48

NONPROFITS

Grants Distributed:

\$41 MILLION

ACROSS:

5,314

GRANTS

1,693

NONPROFITS

Endowments & Scholarships:

123

ENDOWMENT FUNDS DISTRIBUTED

\$1.49 M

FOR NONPROFITS

89

COLLEGE SCHOLARSHIPS AWARDED

\$283 K

FOR STUDENTS

74

CAMP SCHOLARSHIPS AWARDED

\$102 K

FOR CAMPERS

What This Means For Our Community

- **Empowering Generosity:** Thousands of grants have supported causes ranging from education and healthcare to Jewish life and global humanitarian aid.

- **Investing in the Future:** Scholarships are helping the next generation of leaders pursue higher education and build meaningful careers. Young people are provided access to engaging and immersive Jewish camp and youth program experiences.

- **Strength in Numbers:** Our growing AUM reflects the trust and commitment of our donors and partners.

DJCF/SWCF does not accept unsolicited proposals for grants.

Except in rare circumstances, DJCF/SWCF does not make discretionary grants.

FY25 Grantees

1693 grant recipients awarded \$41M in fiscal year 2025.

1736 Family Crisis Center	Discovery Foundation	American Friends of Ogen, Inc.	American Whitewater	Austin Street Center	B'nai B'rith Youth Organization	NY Inc.	Chabad Lubavitch of Park City
A Rocha USA Inc	Amazing Maasai Girls Project	American Friends of Reichman University	Americans for Ben-Gurion University	Austin Sunshine Camps	B'nai Butte	Camp Kudzu, Inc.	Chabad Lubavitch of Richardson
AARP Foundation	America Gives Inc.	American Friends of Shalva Israel	Americans for Israel	Autism Speaks - North Texas & Oklahoma	B'nai Israel Synagogue	Camp Nageela Midwest, Inc.	Chabad Lubavitch of South Texas
Able Springs Volunteer Fire Department	American Academy of Arts and Sciences	AMERICAN FRIENDS OF SOROKA MEDICAL CENTER INC.	Americans for Medical Progress Educational Foundation	Baby2Baby	B'nai Vail Congregation	Camp Nebagamon	Chabad Lubavitch on Campus - Princeton
Abraham Initiatives	American Arbitration Assoc - Int'l Centre for Dispute Resolution Foundation	American Friends of Tel Aviv University	Americans for Peace and Tolerance Inc.	Bais Chabad of Kalkaska Inc.	Boca Raton Museum of Art Inc.	Camp Ohel Inc.	Chabad Lubavitch of Argentina
ABT Performing Arts Association	American Associates	American Friends of the Israel Philharmonic Orchestra, Inc.	Americans United for Separation of Church and State	Bais Medrash of Harborview	Boca Raton Synagogue	Camp Solomon Schechter	Chabad of Argentina Relief Appeal Inc.
Academy at Charlemont	Ben Gurion University of the Negev	American Friends of the Ocean Cleanup Foundation	AmeriCares Foundation	BakerRipley	Bonei Olam	Camp Thunderbird Charitable Foundation	Chabad of Carrollton Lewisville
Accuracy in Media Inc	American Bar Foundation	American Friends of Yad Eliezer	America's VetDogs	Barrington Stage Company	Boston Symphony Orchestra, Inc.	Cancer Fighters Club Fund	Chabad of College Hill Inc.
Achdut-Israel	American Brain Tumor Association	American Friends of Yeshiva Imrei Emes Inc	AMIT Children	Base BSTN/Moishe House	Boston University Hillel	Cancer Support Community North Texas	Chabad of Frisco
ACLU Foundation of Texas	American Cancer Society	Animal Legal Defense Service Committee	Amyloidosis Foundation	Basilica National Shrine of the Immaculate Conception	Boulder Jewish Community Center	CaringBridge	Chabad of Great Neck
Adaptive Golf Program	American Civil Liberties Union Foundation	Angel City Pit Bulls	Andrew McDonough B Positive Foundation	Baylorth Jewish Community Center	Boy Scouts of America	Carmelite Monastery	Chabad of Jamaica
Adas Israel Congregation	American Committee for Weizmann Institute of Science	Animal Shelter of Martha's Vineyard	Andrew McDonough B Positive Foundation	Baylorth Jewish Community Center	Boys & Girls Clubs of Greater Houston	Carnegie Mellon University	Chabad of Malibu
ADI Israel Foundation	American Contract Bridge League Educational Foundation	Ann and Nate Levine Academy	Angel City Pit Bulls	Baylor Oral Health Foundation	Boys and Girls Club of Cuero	Carrell Clinic Foundation	Chabad of Marthas Vineyard
AdmissionSquad, Inc.	American Heart Association	Association & American Stroke Association	Animal Legal Defense Service Committee	Be the Difference Foundation	Boys and Girls Club of Greater Scottsdale	Canine Companions for Independence	Chabad of Maui
AdoptaPlatoon HQ	American Heart Association/Dallas Metropolitan Region	Association & American Stroke Association	American Heart Association	Belev Echad Inc	Boys and Girls Club of Cuero	Capital for Kids	Chabad of North Texas Inc.
Adult Disability Medical Home	AMERICAN HUMANE	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Benedictine Monastery of the Good Shepherd	Boys Scouts of America Bay Area Council	CARE Forward Inc.	Chabad of NW Seattle
Advisory Board Booker T. Washington High School for Performing and Visual Arts	American Indian College Fund	Association & American Stroke Association	AMERICAN HUMANE	Best Buddies International	Boys Town Jerusalem Foundation of America	CaringBridge	Chabad of Pacific Beach
African American Museum	American Institute for Cancer Research	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Best Friends Animal Sanctuary	Bradley Renee Rossel Scholarship	Catch Up & Read	Chabad of Plano / Collin County
African Mission Healthcare	American Jewish Committee	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Beth Medrash Govoha of America	Brady Center to Prevent Handgun Violence	Catholic Charities of Dallas, Inc.	Chabad of Singer Island & the Beaches Inc.
Afsnc Inc	American Jewish Congress	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Beth Yeshurun Day School	Brazelton Touchpoints Project Inc	Catholic Charities of Dallas, Inc.	Chabad of South Austin
Agape Development	American Jewish Historical Society	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Beth-El Synagogue	Breakthrough T1D/ Juvenile Diabetes Research Foundation	Catholic Foreign Mission Society of America Inc	Chabad of Southlake
Agudas Achim Congregation	Arizona State University Foundation	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Beverly Hills Jewish Community	Breast Cancer Research Foundation	Catholic Medical Mission Board	Chabad of Sunset Strip
Agudath Israel of America	Arise Africa	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Biblical Arts Center	Breast Cancer Resource Centers of Texas	Cato Institute	Chabad of the Brazos
Aid for Starving Children	Arizona State University Foundation	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Miracle at Pentecost Foundation	Brennan Center for Justice	Center for a Humane Economy	Chabad of the Central Cascades
Aid to the Church in Need	Arise Africa	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	ASD Hope, Inc.	Bridgercare	Center for Biological Diversity	Chabad of the West Sixties
Air & Space Forces Association	Arizona State University Foundation	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Ashoka Trust For Research In Ecology And The Environment Inc	Bridges Graduate School	Center for Jewish History	Chabad of Uptown Dallas
Air Warrior Courage Foundation	Arise Africa	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Aspen Music Festival & School	BrightFocus Foundation	Center for National Independence in Politics	Chabad of Uptown Dallas
Akiba Yavneh Academy	Arizona State University Foundation	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Aspen Valley Hospital Foundation	Bring the Light Ministries	Center for the Public Interest	Chabad on 17th Street in S. Monica
Alamo Public Telecommunications Council	Arise Africa	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Assistance League of Greater Collin County	Broadway Dallas	Center for Science in the Public Interest	Chabad on Campus at Claremont
Albion High School Alumni Foundation Inc	Arizona State University Foundation	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Association of Marian Helpers	Brooklyn Holistic Synagogue	Center for the Arts	Chabad's Children of Chernobyl
Aleph Institute	Arise Africa	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	At Last Inc.	Brothers For Life	Central Arkansas Library System Foundation	Chai 4Ever Inc
Alex's Lemonade Stand Foundation for Childhood Cancer	Arizona State University Foundation	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Athletes for Israel	Brown Hill Foundation	Central Conference of American Rabbis	Chai Lifeline
All Saints Catholic School	Arise Africa	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Atlanta Community Food Bank	Brown University	Central Fund of Israel	Challenge Air for Kids and Friends, Inc.
All Saints' Episcopal School	Arizona State University Foundation	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Attitudes & Attire	Bryn Mawr School for Girls of Baltimore City	Central Texas Food Bank	Chancery Office of the Catholic Diocese of Dallas
All Saints Lutheran Church	Arise Africa	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	ATZUM	Bunker Hill Education Foundation	Cheder Lubavitch of Dallas	Charlotte and Joe Webberman Jewish Teen Camp
Allergists for Israel	Arizona State University Foundation	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Audubon Dallas	Business Executives for National Security	Cherid Lubavitch of Dallas	Cheder Lubavitch of Dallas
Alliance for Global Justice	Arise Africa	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Austin Achieve Public Schools	Cal Farley's Boys Ranch	Cherid Lubavitch of Dallas	Cheder Lubavitch of Dallas
ALS Association	Arizona State University Foundation	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Austin Community Foundation for the Capital Area	California Community Foundation	Cherid Lubavitch of Dallas	Cheder Lubavitch of Dallas
ALS Association Texas Chapter	Arise Africa	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Austin Film Society	California Fire Foundation	Cherid Lubavitch of Dallas	Cheder Lubavitch of Dallas
Alzheimer's Association - Texas Chapter	Arizona State University Foundation	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Austin Pets Alive	Calvary Chapel of San Antonio	Cherid Lubavitch of Dallas	Cheder Lubavitch of Dallas
Alzheimer's Disease and Related Disorders Association	Arise Africa	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region	Austin Public Library Friends Foundation	Camden Public Library Fund	Cherid Lubavitch of Dallas	Cheder Lubavitch of Dallas
Alzheimer's Disease Research	Arizona State University Foundation	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region		Camp Airy & Camp Louise Foundation	Cherid Lubavitch of Dallas	Cheder Lubavitch of Dallas
Alzheimer's Drug	Arise Africa	Association & American Stroke Association	American Heart Association/Dallas Metropolitan Region		Camp Chaverim	Cherid Lubavitch of Dallas	Cheder Lubavitch of Dallas

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FY25 Grantees (cont.)

Children International Childrens Advocacy Center of Collin County Children's Assessment Center Children's Bereavement Center of South Texas Children's Craniofacial Association Children's Hospital of Philadelphia Foundation Children's Medical Center Foundation Children's Medical Center of Dallas Children's Mercy Hospital Chimes Foundation CHOSEN PEOPLE MINISTRIES INC Christ Church Cathedral Christ Episcopal Church Christian Aid Mission Christian Journey Courses Christopher Reeve Foundation Church of the Incarnation Cibolo Center for Conservation Cindy and Barry Zale Family Fund Citizens United Foundation City Year, Inc. Clarion Project Climate Solutions CO2 Coalition Inc Coalition for the Homeless of Houston Coast Guard Foundation Inc Coast Guard Mutual Assistance Coastal Conservation Association Coastline Christian Academy Coconut Grove Elementary PTA Code 2 College Colel Chabad College Of Charleston School of Business Columbia University Columbia/Barnard Hillel/Jewish Campus Life Fund Inc. Comboni Missionaries of the Heart of Jesus Commentary Inc. Committee for Accuracy in Middle East Reporting in America Committee to Protect Journalists Communities in Schools Community Assistance Center Community Childrens Ministry Community Foundation of the Texas Hill Country Community Homes for	Adults Foundation Community Homes for Adults, Inc. Community Learning Foundation Community Works Computer Sciences for the Blind Computers for the Blind Comunidad Para Baja California Concern for Independent Living Congregation Agudath Jacob Congregation Ahavath Sholom Congregation Albert Torah Congregation Anshai Torah Congregation Atares Israel Congregation Beth Abraham Congregation Beth El Congregation Beth El Binah Congregation Beth Israel Congregation Beth Jacob Congregation Beth Menachem of Glogev Congregation Beth Shalom Congregation Beth Torah Congregation Beth Yeshurun Congregation Beth-El Congregation Beth-El of Miami Beach Congregation B'nai Israel Congregation B'nai Jehoshua Beth Elohim Congregation Emanu El Congregation Lev Aharon Congregation Lev Yisrael Congregation Micah Congregation Ner Tamid Congregation Neveh Shalom Congregation Nishmat Am Congregation of Holy Cross, US Province Inc Congregation Ohab Zedek Congregation Ohev Shalom Congregation Ohr HaTorah Congregation Olam Tikvah Congregation Shaare Tefilla Congregation Shaareth Israel Congregation Shearith Israel Congregation Shearith Israel - Atlanta Congregation Shearith Israel Foundation Congregation Shearith Israel New York Congregation Shearith	Israel Sisterhood Congregation Talmud Torah Adereth El Congregation Tiferet Israel Congregation Toras Chaim Congregation Zichron Mordechai Shlomo Congregation Zichron Yisroel Connect Israel Consortium of Jewish Day Schools Inc Conspirare, Inc. Cook Children's Health Foundation Congregation Ahavath Sholom Congregation Albert Torah Congregation Anshai Torah Congregation Atares Israel Congregation Beth Abraham Congregation Beth El Congregation Beth El Binah Congregation Beth Israel Congregation Beth Jacob Congregation Beth Menachem of Glogev Congregation Beth Shalom Congregation Beth Torah Congregation Beth Yeshurun Congregation Beth-El Congregation Beth-El of Miami Beach Congregation B'nai Israel Congregation B'nai Jehoshua Beth Elohim Congregation Emanu El Congregation Lev Aharon Congregation Lev Yisrael Congregation Micah Congregation Ner Tamid Congregation Neveh Shalom Congregation Nishmat Am Congregation of Holy Cross, US Province Inc Congregation Ohab Zedek Congregation Ohev Shalom Congregation Ohr HaTorah Congregation Olam Tikvah Congregation Shaare Tefilla Congregation Shaareth Israel Congregation Shearith Israel Congregation Shearith Israel - Atlanta Congregation Shearith Israel Foundation Congregation Shearith Israel New York Congregation Shearith	Crisis Response - The Jewish National Fund-USA Crisis Response - The MACA Foundation Crisis Response - US Friends of ERAN Crisis Response - Why Israel Matters Crisis Response - WIZO Crisis Response - Zaka Search & Rescue Crisis Support Therapy Partners Crohn's & Colitis Foundation Crohn's & Colitis Foundation of America Crosier International Trust for Religious Life and Service Crossroads Community Services Crystal Charity Ball CUFI FOUNDATION Culinary Institute of America Cure Glaucoma Foundation Crested Butte Land Trust Crested Butte Mountain Heritage Museum Crested Butte Nordic Crisis Response - American Friends of Leket Israel Crisis Response - American Friends of Magen David Adom Crisis Response - American Friends of Meir Panim Crisis Response - American Friends of NATAL Crisis Response - American Jewish Committee (AJC) Crisis Response - Anti- Defamation League Crisis Response - Assure for the Children Crisis Response - Friends of the IDF Crisis Response - Hillel International Crisis Response - IsraAID Crisis Response - Network for Animals Crisis Response - Texas Hillel Foundation Crisis Response - The American Jewish Joint Distribution Committee (JDC) Crisis Response - The Hostages and Missing Families Forum Crisis Response - The Jewish Agency's Fund for Victims of Terror Crisis Response - The Jewish Federation of Greater Dallas	Loan Association Dallas Holocaust and Human Rights Museum Dallas International Steam Academy Foundation Dallas Jewish Burial Operations Fund Dallas Jewish Community Foundation Dallas Jewish Historical Society Dallas Ministry For Life Dallas Morning News Charities Dallas Museum of Art Dallas Opera Dallas Scottish Rite Library & Museum Dallas Service Forum Inc. Dallas Services Dallas Symphony Association Dallas Symphony Chorus Dallas Symphony Orchestra Dallas Theater Center Dallas Torah Institute Dallas Women's Forum Dallas Zoological Society Dana Farber Cancer Institute Dana Thomas House Foundation DanceAspen DATA of Plano David Horowitz Freedom Center Dell Children's Medical Center Foundation Delta Pet Partners of San Antonio Desert Scholarship Foundation DFW Pug Rescue Club Inc DHanis Youth Association Disabled American Veterans Charitable Service Trust Dallas Bar Association Community Service Fund Dallas Black Dance Theatre Dallas CASA Dallas Center for the Performing Arts Foundation Dallas Chamber Symphony Dallas Children's Advocacy Center Dallas Children's Theater Dallas Christian School Dallas City Athletics Dallas College - Brookhaven Campus Dallas College- Eastfield Campus Dallas Education Foundation Dallas Foundation Dallas Furniture Bank Dallas Hebrew Free	Partnership Inc Dripping Springs Helping Hands Drive A Senior Austin Texas Duck Team 6 Durango Friends of the Arts Eanes Education Foundation Earthjustice East Fort Bend Human Needs Ministry, Inc. East Lake Pet Orphanage East Texas A&M University East Texas Alzheimers Alliance East Texas Food Bank Ecclesia Houston Educational First Steps Educational Opportunities Ekisa Ministries International El Paso Community Foundation Elderhostel Eldridge Street Project Elephant Family USA Eli and Bessie Cohen Camps Elks National Foundation Inc. Emancipet Emory University En Od Milvado Foundation Inc Endowment for Middle East Truth Environmental Defense Fund Inc. Environmental Learning for Kids Epilepsy Foundation of Texas Epstein Hear Us Now Foundation Epstein School Foundation Equal Justice Initiative Equest Eternal Word Television Network, Inc Ethics and Public Policy Center, Inc. Etzion Foundation Everson Museum of Art of Syracuse and Onandaga County Everytown for Gun Safety Support Fund Ezer Mizion Ezrat Israel Inc. Facts and Logic About the Middle East, Inc. Fairhill School Faith Commons Faith Roots Reproductive Action Family Eldercare Family Gateway Inc. Family Place Family Promise of Lincoln County Family Service Center of Galveston County Farmers Branch Community Theatre Fathers of St. Edmund Southern Missions, Inc.	Federation for American Immigration Reform Federation of Jewish Communities of the CIS Federation of Jewish Mens Clubs Inc Feed Israel Feed My Starving Children Feed Oak Cliff Feed the Children Feed The Hungry Feeding America Feeding Pets of the Homeless FINCA International, Inc. First Christian Church First Descents First Methodist of Forney First Presbyterian Church First Presbyterian Church of Dallas Foundation First United Methodist Church of Austin First United Methodist Church, Inc Fisher House Foundation Florence Melton School of Adult Jewish Learning Florida International University Foundation Food Allergy Research & Education Fore the Kids Foundation Inc. Forest Forward Formosan Association for Public Affairs Fort Davis Higher Education Foundation Fort Worth Modern Art Museum Association Foundation for Aids Research Foundation for Brain Healthadvances Foundation for Defense of Democracies Foundation for Jewish Camp, Inc. Foundation for Jewish Philanthropies Foundation for Student Communication Inc Foundation for the Callier Center for Communication Disorders Foundation for the Defense of Democracies Foundation to Combat Anti-Semitism Franciscan Missions Free Chapel Gainesville Fresh Air Society/ Tamarack Camps Friar Society Alumni Network Friedla Glauben Memorial Fund Friends Foundation	Friends of Blue Hole Friends of Cascade- Siskiyou National Monument Friends of Dallas Animal Services Friends of Duvdevan Friends of ELNET Friends of Hagerman National Wildlife Refuge Foundation Friends of Hospice San Antonio Inc Friends of Israel Defense Forces Friends of Israel Defense Forces North Texas Friends of Israel Disabled Veterans Friends of JCC Krakow Inc. Friends of Keshet Foundation Friends of Lubavitch Friends of Lubavitch of Bergen County Friends of Mishpacha Orphanage Odessa Mishpacha Childrens Home Friends of Northaven Trail Friends of Sheba Medical Center/Hope without Boundaries Friends of the Arava Institute Friends of the Aspen Animal Shelter Friends of the Cultural Center Friends of the Dallas Public Library Friends of the Israel Defense Forces Friends of the Israel Movement for Progressive Judaism Friends of the Jeff Davis County Library Friends of the Katy Trail, Inc. Friends of the Riter C Hulsey Public Library Friends of the Texas Holocaust, Genocide, and Antisemitism Advisory Commission Friends of the THGAAC Friends of the University Park Public Library Friends of the Wimberley Village Library Friends of the World Food Program Friends of United Hatzalah Inc Friends of Yad Lakashish - Lifeline for the Old Friends of Yad Sarah Friendship Circle of Dallas Friendship Circle of Greater Miami Frisco Community Theatre Inc. Frisco Family Services Fund Access Forward Gallatin Valley Land Trust	Galveston Bay Foundation Galveston Chamber of Commerce Galveston County Food Bank Galveston Lions Club Foundation Gan Menachem Gary Sinise Foundation Gause Cemetery Foundation Genesis Women's Shelter & Support George Bush Presidential Library Foundation George W. Bush Foundation George Washington University/Division of Development and Alumni Relations Georgetown University/Gift Processing Gifford's Law Center to Prevent Gun Violence Girl Scouts of Northeast Texas Girls, Inc. of Metropolitan Dallas GiveWell Giving Back Fund Gladney Center Glaucoma Foundation Glaucoma Research Foundation Global Child Advocates Global Israel Alliance GlobalGiving Foundation GO2 for Lung Cancer Golden Retriever Rescue of North Texas Goldring/Woldenberg Institute of Southern Jewish Life Good People Fund Good Samaritan Center of San Antonio Good Shepherd Good Shepherd Church and School Good Shepherd Hospital Inc Goodwill Industries of Central Texas Grace Bible Church Grady Memorial Hospital Corporation Grambling State University Grant Halliburton Foundation Inc. Greater Austin Asian Chamber of Commerce Foundation Greater Boston Legal Services, Inc. Greater Edwards Acquifer Alliance Inc Greater Portland Family Promise Greek Jewish and Sephardic Cultural Foundation Inc Green America Greenhill School Greenlight Fund Greenpeace Fund, Inc.	Ground Game Fund GSD Advisers, Inc. Guardians of Rescue Inc. Guide Dogs for the Blind Guide Dogs of Texas Guideline Services H.C.S.C. Foundation Habitat for Humanity International, Inc. Habitat for Humanity of Collin County Habitat for Humanity of San Antonio Hackley School Hadassah Hal Coker Memorial Buckaroo Benefit Fund HALO Animal Rescue HaMakom Hand in Hand American Friends of Center for Jewish- Arab Education in Israel Happy Lungs Project Harlem Grown Harmony Foundation International Harold Grinspoon Foundation Harry S. Truman Library Institute for National & Intl. Affairs Harvard Law School Hatzalah Shomron Headliners Foundation of Texas Head-Royce School Healing for Heroes - A Disabled Veterans Retreat and Wooded Oasis Healthcare for the Homeless Houston Healthy Acadia Healthy Futures of Texas Heard Natural Science Museum & Wildlife Sanctuary Heartbeat International Hebrew Benevolent Congregation the Temple Hebrew Immigrant Aid Society Hebrew Order of David Dallas Hebrew Theological College Hebrew Union College- Jewish Institute of Religion Hebrew Union Congregation Hebron Fund Inc. Heifer International Heifer Project International Helen Keller International Helping Hand Home for Children Henry George School of Social Science Hevreh of Southern Berkshire Inc HIAS Inc. High Adventure Treks	for Dads & Daughters Highland Park ISD Education Foundation Highland Park Presbyterian Church Highland Park United Methodist Church Hill Country Christian School of Austin Hill Country Community Band Hill Country Master Naturalist Hill Country Youth Ranch Hillcrest High School Community Foundation Hillel at the University of New Mexico Hillel at Tufts University Hillel Foundation at the University of Arizona Hillel International Hillel of Dallas Hillel The Foundation for Jewish Campus Life Hillel the Foundation for Jewish Campus Life Cincinnati University Hillel the Foundation for Jewish Campus Life/Kansas University Hillel the Foundation for Jewish Campus Life/Purdue Hillel Torah North Suburban Day School Hillel: The Foundation for Jewish Campus Life Hillsdale College Hoag Library of the Swan Library Association Hobart and William Smith Colleges Hockaday School Holocaust Museum Houston Holy Family Catholic School Galveston Holy Family Catholic School of Austin Holy Family of Nazareth Catholic Parish Holy Trinity Catholic Parish Holy Trinity Seminary Homeless Veterans Services of Dallas Honest Reporting Hooves and Hearts Hope & Health Project Hope Adoption Inc./ Hope International Hope Appeal Hope for Children of Tigray Hope Media Group Hope Supply Co. Hope of the Western Reserve Inc Housing Forward Houston Center for Contemporary Craft Houston Food Bank Houston Golf	Association Houston Hillel Inc. Houston Independent School District Foundation Houston Jewish Geriatric Foundation Houston Livestock Show and Rodeo Inc Houston Public Media Foundation Houston SPCA Houston Symphony Society Houston's Amazing Place, Inc. Hugs Cafe Inc Human Resource Development Council of District IX Inc. Human Rights Campaign Foundation Human Rights Initiative of North Texas, Inc. Humane Society of Charlotte Humane Society of Dallas County I Can Still Shine Program Inc IF Institute Iglesia Peniel Illinois Executive Mansion Association Illinois Symphony Orchestra Imagination Productions/OpenDor Media Imd Guest House Foundation Immune Deficiency Foundation Impact Forum Foundation Impact Israel Impacting the Future Now In Concert for Cancer In the City for Good Incarinate Word Academy Indian and Forest Acres Alumni Scholarship Foundation Indiana University Foundation Indiana University Hillel Foundation Indigo Arts Alliance Innocence Project of Texas Innocence Project, Inc. Interfaith Action of Central Texas/IACT Interfaith Alliance Foundation Interfaith Ministries for Greater Houston International Beit Din International Council of Shopping Centers Foundation Inc International Fellowship of Christians and Jews International Fund for Animal Welfare International Peace Institute	International Rescue Committee International Waldenstrom's Macroglobulinemia Foundation In-Vest USA Ira E Tobolowsky Foundation Ireach Global Irvin M. Shlenker School of Congregation Beth Israel Isaac M Wise Temple IsraAID (US) Global Humanitarian Assistance Israel Advocacy Group Israel Cancer Research Fund Israel Children's Cancer Foundation Israel Education Resource Center/The iCenter Israel Emergency Alliance Israel Experience Tide Inc. Israel Guide Dog Center for the Blind Israel Now Forum Israel ParaSport Center Israel365/Teach for Israel Israel-America Academic Exchange Ivan Carter Wildlife Conservation Alliance J Give-Friends of Asor Fund USA Inc. Jake E's Riding Round Up Jamaica Youth Education Support James Dick Foundation for the Performing Arts Jane's Due Process Jazz at Aspen - Snowmass JBI Library JCC of Manhattan JDC - Jewish Coalition for Disaster Relief Jesuit College Preparatory School of Dallas, Inc. Jesuit Refugee Services USA Jesuit Volunteer Corps JET Jewish Agency for Israel - North American Council Jewish Center of the Bay Cities Jewish Children's Regional Service Jewish Community Center - Chabad Vail Jewish Community Center Association - St. Louis Jewish Community Center of Dallas Jewish Community Center of Greater Albuquerque Jewish Community Centers Association	Jewish Community Federation of San Francisco Jewish Community of Jackson - Jackson Chevri Foundation JEWISH CULTURE HIGH SCHOOL INC Jewish Culture High School Inc. Jewish Enrichment Center Jewish Family & Children's Service Jewish Family and Children's Service Of The Suncoast Inc Jewish Family Service Houston Jewish Family Service of Colorado Jewish Family Service of Greater Dallas Jewish Family Service of Greater Dallas Foundation Jewish Family Service of Greater New Orleans Jewish Family Service of Metrowest Jewish Family Services of Greater Orlando Jewish Family Services of WNC Jewish Federation Jewish Social Service Jewish Federation of Greater Dallas Jewish Federation of Greater Houston Jewish Federation of Greater Los Angeles Jewish Federation of Greater Portland Jewish Federation of Palm Springs and Desert Area Jewish Federation of the Berkshires, Inc. Pittsfield Jewish Jewish Federation of Waco Jewish Federations of North America Jewish Foundation for the Righteous Jewish Institute for National Security of America Jewish Learning Institute Jewish Nation Undergraduate at University of Miami Jewish National Fund Jewish National Fund- USA Inc Jewish Relief Network Ukraine Jewish Student Union of St. Louis Jewish Telegraphic Agency Jewish Theological Seminary of America Jewish Unity International Inc. Jewish Women International Jewish Women's Archive JewishGen JJ Pearce Theater Booster Club Johns Hopkins Medicine Johns Hopkins University	Jonathan's Place Joyce Meyer Ministries Inc Jubilee Park & Community Center Judicial Watch, Inc. June Shelton School and Evaluation Center Junior League of Galveston County Junior Players Guild K U Endowment Charitable Gift Fund Kg Lifeline Rescue Inc Kgs for Warriors Kadima Hebrew Academy Kahal Kadosh Beth Elohim Kalamazoo College Kansas University Endowment Association Katelle Foundation Inc. Kavod-Ensuring Dignity for Holocaust Survivors Keep Memory Alive Kehila Kedosha Janina Preservation and Cultural Fund Inc Keren-Or, Inc. Kerrville Folk Festival Foundation Inc Keshet Israel Kickstart Kids Kid Net Foundation Kimbell Art Foundation kindness initiative Kiryat Shemona Foundation Inc K-Love Inc Kneisel Hall Knox County Homeless Coalition Koolen-de Vries Syndrome Foundation Kumi Uri USA Laguna Madre Youth Center Lambda Legal Defense and Education Fund Lawyers' Committee for Civil Rights Under Law Leader Dogs for the Blind Leaders of the 21st Century Leadership Institute League of Women Voters of Dallas Education Fund Legacy at Midtown Park, Inc. Legacy Senior Communities Foundation Legion of Christ, Inc. Leleka Foundation Lemon Aide Society Lesea Global Feed the Hungry Leukemia & Lymphoma Society Leukemia and Lymphoma Society Lewy Body Dementia Association LIFT	LIFT dba Aspire LIFT Inc. Lighthouse Guild Lights Out Gallery Limnud NA Lincoln Memorial Congregational United Church of Christ Lincoln Square Synagogue Lismore Road Inc Listening House of St Paul Literacy Achieves Living Classrooms Foundation Living Journeys Llano Quilts Of Valor Logan Community Resources Longmeadow Cemetery Association Los Angeles Fire Department Foundation Los Angeles Regional Food Bank Louis D. Brandeis Center Louisiana Tech University Lowell Catholic Lubavitch Chabad of the Loop & Lincoln Park Lubavitch-Chabad Jewish Center of Gainesville Lumin Education Lung Cancer Research Foundation Lynn and Lenny Krasnow Philanthropic Fund Maayan Chai Foundation Maayan Midwest Camps/MMW Maccabi USA MacDowell Colony Inc. Macular Degeneration Research MADRE Magen David Congregation of Surfside Inc Mahaiwe Performing Arts Center Maimonides School Maine Charitable Mechanic Association Maine Initiatives, Inc. Maine Jewish Museum Make-A-Wish Foundation Manhattan Institute for Policy Research Manna - The Durango Soup Kitchen Marc Lustgarten Pancreatic Cancer Foundation March of Dimes March to the Polls Marco Polo Margolin Hebrew Academy-Yeshiva of the South Marian Fathers of the Immaculate Conception of the B.V.M., Inc.
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FY25 Grantees (cont.)

Marine Corps Heritage Foundation	Holocaust Education Foundation Inc.	Sclerosis Society	Ocean Conservancy	American Way Foundation	Crested Butte	SAFE Alliance	Sigma Xi, The Scientific Research Honor Society	Sisters Of The Holy Family	Temple Emanu-El Brotherhood	University	at Austin	Union of Maine Visual Artists Inc	University of Texas at Arlington	Vivian Beaumont Theater Inc	Worldwide Friends Foundation
Marine Toys for Tots Foundation	Mikvah Association of Dallas	National Museum of American Jewish History	Oceana Inc	People for the Ethical Treatment of Animals (PETA)	Pup Squad Animal Rescue	SafeHaven of Tarrant County	Silver Spurs Alumni Association Inc	St. Andrew's Church and School Inc	Temple Emanu-El Foundation	Texas Woman's University Foundation	The University of Texas at El Paso	Union of Orthodox Jewish Congregations of America	University of Texas at Austin	Vogel Alcove Foundation	Wounded Warriors Project
Marion County Chamber of Commerce	Milken Community Schools	National Organization for Rare Disorders, Inc.	Ohavi Zedek	People's Community Clinic	Rabbi Isaac Elchanan Theological Seminary	Salvation Army	Simcha Connection Inc.	St. Augustine High School	Temple Emanu-El WRJ/Sisterhood	Texas Women's Foundation	The University of Texas System	United Against Human Trafficking	University of Texas at Austin College of Education	VOLUNTEER FIREFIGHTER ALLIANCE	WQXR Classical Music Radio
Martha's Vineyard Hebrew Center	Minnie's Food Pantry	National Parks Conservation Association	Oheb Zedek Cedar Sinai Synagogue	Performing Arts Cultural Exchange	Rabbinical College of Telshe Inc.	Salvation Army of Houston	Simon Wiesenthal Center	St. Baldrick's Foundation	Temple Har Shalom	Thanks-Giving Foundation	The Village Temple	United Ministry To the Port of Galveston Inc	University of Texas at Dallas	Volunteer Legal Services of Central Texas	Writer's Garret
Masonic Brotherhood Foundation	Mission Aviation Fellowship	National Philanthropic Trust	Oholei Yosef Yitzchok Lubavitch (OYYL)	Perot Museum of Nature and Science	Rabbinical Council of America	Samaritan Inn	Sisters of St Michael the Arch Angel Inc	St. Cecilia Congregation	Temple Micah	Theater Memphis	The Wilderness Society	United Negro College Fund	University of Texas at San Antonio	Waller Christian Academy	WUNC
Masorti Foundation for Conservative Judaism in Israel	Mission of Our Lady of Mercy, Inc.	National Police Association	Ohr Torah Stone	Perry S. Kaufman DAF	Radical Art in Action	San Antonio Food Bank	Sisters of St. Benedict of Ferdinand, Indiana	St. Cyril and Methodious Catholic Church	Temple Shalom	The American Council of the Asian Christian Academy	The Weber School	United Service Organizations	University of Texas at Tyler	Yakar Foundation, Inc.	Yellowstone Academy
Massachusetts Audubon Society	Missionary Oblates of Mary Immaculate Southern Province	National Public Radio	Omaha Home for Boys	Phi Beta Kappa Society	RAICES	San Francisco Jewish Comm Publications	Site Santa Fe	St. David's Episcopal Church	Temple Sinai of Palm Beach County	The Better Angels Society	The HopeLine, Inc	United States Coast Guard Auxiliary	University of Texas Chabad House	Yeshiva Keren Orah	
MassChallenge	Mitzya House of Yeshivah Gur Aryeh Inc	National Memorial & Museum at World Trade Center Foundation	One Accord for Kids	Philharmonic-Symphony Society of New York Inc	Ramah Darom, Inc.	San Jacinto Museum and Battlefield	Sjogren's Syndrome Foundation	St. John the Divine	Terrell ISD Excellence Foundation	Tikvah Fund	Thoroughbred Retirement Foundation	United States Committee Sports For Israel	University of Texas Foundation	Yeshiva Ohr Elchonon Chabad	
Max Glauken Holocaust Educational Foundation	Mobile Comunidad	National September 11 Memorial & Museum	One Family Fund	Phoenix Multisport Inc	Razorback Foundation, Inc.	Sanctuary Golf Club Foundation Inc	Smile Train	St. Joseph's Indian School	Texasans On Mission	TITAS	Torah Day School of Dallas	United States Bishops	University of Texas Health Science Center at San Antonio	Yeshiva Summer Program	
Mayo Street Arts	Mobile Loaves & Fishes	National Shrine of Our Lady of Mount Carmel	One Hundred Shares Dallas Inc	Physicians Committee for Responsible Medicine, Inc.	Reading Is Fundamental	Sandler Family Foundation	Smithsonian Institution	St. Jude Children's Research Hospital	Texas A & M University	Top Dawg Love the Kids	Torah Learning Enrichment Inc.	United States Deputy Sheriff's Association	University of Texas Performing Arts	Yeshiva University	
Mazon - A Jewish Response to Hunger	Modern Military Association of America	National Vietnam War Museum Inc	Open University Foundation	Pilots N Paws	Red Cloud Indian School	Sanibel-Captiva Conservation Foundation	SMU Athletics	St. Jude Thaddeus Catholic Church	Texas A&M University at Galveston	Torah Outreach Resource Center of Houston	Torah Day School of Dallas	United States Olympic and Paralympic Committee	University of Texas Health Science Center at San Antonio	Yeshivat Chovevei Torah Rabbinical School	
McNay Art Museum	Moody Family YMCA	National Wildlife Foundation	Operation Homefront	PKD Foundation	REDgen	San Jose Museum of Art	SMU Meadows Museum	St. Louis Hillel	Texas Appleseed	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Holocaust Memorial Museum	University of Texas Law School Foundation	Yeshivat Lev HaTorah	
MD Anderson Cancer Center	Morehouse College	National Women's Health Network	Operation HELO	Planned Parenthood Federation of America	RefRover	Santa Fe Chamber Music Festival	SMU/Student Account Services	St. Mark's School of Texas	Texas Baptist Men Inc	Transform 1012 N Main Street	Torah Learning Enrichment Inc.	United States Holocaust Memorial Museum	University of Texas Southwestern Medical School	Yonkers Partners in Education	
MD Anderson Services Corporation	Morgan's Wonderland	National Yiddish Book Center Inc.	Operation Kindness	Planned Parenthood of Greater Ohio	Refugee Services of Texas	Santa Fe Farmers Market Institute	SMU-Dedman School of Law	St. Mary's Health System	Texas Campaign for the Environment Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Meadows School of the Arts	Mothers Against Drunk Driving - MADD	National Yiddish Book Center Inc.	Operation Smile	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Sarasota Memorial Healthcare Foundation	SMU-Meadows School of the Arts	St. Mary's of the Lake Roman Catholic Church	Texas Children's Hospital	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Meals on Wheels Collin County	Moving Picture Institute	Natural Resources Defense Council	Orange County Rescue Mission, Inc.	Planned Parenthood of Greater Texas	Religious Coalition for Reproductive Choice Educational Fund	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Matthew's Cathedral	Texas Christian University	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Meals on Wheels of Tarrant County	Muscular Dystrophy Association	Nature Conservancy	Organization for Autism Research Inc.	Planned Parenthood Of The Rocky Mountains, Inc.	Renewal of Life Inc.	Save the Children Federation, Inc.	Snowdrop Foundation Inc.	St. Philips School and Community Center	Texas Civil Rights Project	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Meals on Wheels of Orange County	Museum of Biblical Arts	Ner Israel Rabbinical College	ORT America	Plano Metropolitan Ballet	Resource Center	Save-A-Pet Animal Rescue Inc.	Social Good Fund	St. Philips School and Community Center	Texas Cultural Trust Council	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Medical Institute for Sexual Health	Museum of Jewish Heritage	Nevut - International Lone Soldiers, Inc	OU Foundation	Plano Police Association	Results Educational Fund, Inc.	Saving Paws Rescue AZ	Society of the Little Flower	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Medina Community Library	Museum of the Southern Jewish Experience	Nevut - International Lone Soldiers, Inc	Our Friends Place	Plano Police Association	Results Educational Fund, Inc.	Saving Paws Rescue AZ	Society of the Little Flower	St. Vincent's House	Texas Equusearch	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Meir Panim Lachayal Institute	Muscular Dystrophy Association	Nature Conservancy	Orange County Rescue Mission, Inc.	Planned Parenthood of Greater Texas	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Vincent's House	Texas Freedom Network Education Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Memorial Sloan Kettering Cancer Center	Museum of Biblical Arts	Ner Israel Rabbinical College	Operation Kindness	Planned Parenthood Of The Rocky Mountains, Inc.	Resource Center	Save-A-Pet Animal Rescue Inc.	Social Good Fund	St. Philips School and Community Center	Texas Cultural Trust Council	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Memorial Village Police Foundation	Museum of Jewish Heritage	Nevut - International Lone Soldiers, Inc	Operation HELO	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Mercury One Inc.	Muscular Dystrophy Association	Nature Conservancy	Orange County Rescue Mission, Inc.	Planned Parenthood of Greater Texas	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Mercy Chefs	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Mercy Corps	Muscular Dystrophy Association	Nature Conservancy	Operation HELO	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Mercy Ships International	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Merkaz Hageula Inc.	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Merona Leadership Foundation	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Mesivta Postville	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Mesivta Yeshiva Rabbi Chaim Berlin	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Mesivtha Tifereth Jerusalem	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Mesorah High School for Girls	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Methodist Children's Home	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Metrocare Services	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Meyer L. Bodoff Memorial Award	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Michael J. Fox Foundation for Parkinson's Research	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Michaels Family Scholarship for Indigenous Students	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Michigan State University	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Middle East Media Research Institute	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Midland Cat Wranglers Theatre	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Midwestern State University	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	
Mike Jacobs	Muscular Dystrophy Association	Nature Conservancy	Operation Kindness	Planned Parenthood of Greater Ohio	Regents of the University of Michigan	Save a Child's Heart Foundation US, Inc.	SMU-Perkins School of Theology	St. Rita Catholic Parish	Texas Equal Access Fund	Trans Pride Initiative	Torah Outreach Resource Center of Houston	United States Olympic and Paralympic Committee	University of Texas Southwestern Medical School	Yonkers Partners in Education	

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