



The Dream Principle

Inspired philanthropy for families

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"There is nothing like a dream to create the future"

Zadok Robinowitz

You

can take your philanthropy to another level - one that shouts who you are; what you stand for; what matters;

can inspire your children to carry on a tradition of giving according to their dreams and your example: can secure a vibrant and Jewish community of the future where synagogues are strong and schools nurture excellence and outstanding leaders;

will be remembered; your example will captivate and inspire future generations;

will make an impact; create something meaningful; of consequence;

will accomplish all you set out to do - taking advantage of smart, sophisticated gift planning;

will fulfil your dreams in ways that nurture your spirit and live forever.

The Dream Principle

The Family Philanthropy Institute is a program of the Jewish Community Foundation of Montreal - our community's address for planned giving and family philanthropy.

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Inspired giving starts with dreams

Perhaps I'm stating the obvious, but having been a number-cruncher all my professional life, I view philanthropy from a tax strategy perspective, taking for granted that our donors have philanthropic hearts and genuinely want to build and fortify our community for the future.



Bobby Kleinman

As you have heard we're placing a new emphasis on values and personal goals when it comes to family giving. We're referring to dream-based Tzedakah. That's what it's always been about for our donors. But I'm learning that articulating one's dreams is a jumping off point that leads to formulating one's philanthropic goals in a deeply personal and meaningful way.

Enter the Dream Principle. It's nothing new. Just a philosophy of giving that puts what you want front and centre. It's amazing how it colours and defines the conversation and the thought process.

The Dream Principle represents a higher level of Jewish giving. It creates an amazing context in which to build a family foundation, conduct your charitable transactions; create a gift of life insurance or the transfer of assets.

So talk to me about your dreams; then we can talk about enlightened giving and strategic estate and tax planning. The number-crunching will follow. In the meantime, we have the resources and tools to help you activate the process.

The Family Philanthropy Institute

The Family Philanthropy Institute (FPI) is a resource centre for families who wish to ensure that their philanthropic dreams are operationalized and passed down to their children and grandchildren. We have the tools to help you get started on the path to creating a family legacy that reflects your goals and those of your family.

So where to start? How do you organize to allow multiple family members from multiple generations to participate in the same effort and, in essence, get on the same page?

It helps to know where you are in your family philanthropy process and where you want to go. I invite you to check out the **JCF Family Giving Inventory checklist** to take stock of where you are in your family planning and identify the guidance you need to fulfill your philanthropic dreams. We'll then help you realize them.

Enrich your family time this Chanukah

Talk about dream-based philanthropy. Even if you don't have a specific structure for giving together, you can discuss what matters as a family unit and as individuals and, perhaps, create Tzedakah based on these values.



Beyond that, give of your time. Volunteer to make this a memorable holiday for others.

If you would like to discuss your plans for family philanthropy in complete confidence, please do not hesitate to [contact me](#).

Chag Samech!
Robert A. Kleinman FCA
Executive Director
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Taking care of tomorrow...today

The Jewish Community Foundation of Montreal
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