

Women Who Lead

Demystifying Donor Advised Funds

About the Speakers

Ellen Smith-Israelson



Ellen Smith-Israelson, CFRE, is the Vice President of Philanthropic Services & CMO for Jewish Communal Fund (JCF), the donor advised fund of the Jewish community. Now in its 50th year, JCF manages approximately \$2.8 billion in charitable assets for 4,600 funds.

Ellen oversees JCF's Marketing & Development and Donor Relations teams. The development team cultivates current donors who contribute an average of \$550 million annually to their donor advised funds. Additionally, Ellen's team is responsible for building the donor base by acquiring an average of 250 new DAF accounts and \$60 million in assets from these new accounts each year. This growth is a result of her innovations to bolster networks of referral sources, donor stewardship, and build capacity to accept gifts of complex assets. Ellen helps the marketing team develop an omni-channel strategy and oversees all advertising and public relations initiatives. In addition, she oversees JCF's philanthropic services providing a variety of educational

resources including webinars, podcasts, and print material. She collaborated with Rockefeller Philanthropy Advisors and Jewish Funders Network on the creation of the *Jewish Philanthropy Road Ma*.

Ellen served on the national board of Advisors in Philanthropy (AiP), and currently is a member of NYSSCPAs Family Office Committee, Association of Fundraising Professionals, WID and PPGNY. Prior to joining Jewish Communal Fund, Ellen served as the Executive Director of the Long Island Chapter of American Jewish Committee. Before joining AJC, she was a marketing and fundraising consultant, the Director of Corporate and Foundation Giving at Hofstra University, and Associate Director of Development at North Shore University Hospital.

Janice Schoos



Janice Schoos serves as a philanthropic specialist and senior vice president within the Wealth & Investment Management division at Wells Fargo. She is passionate about advising individuals and families on ways to increase their social impact while meeting their overall wealth planning goals.

Ms. Schoos leads clients in meaningful discussions to define their shared values and to build a plan to help ensure the family's philanthropic investments are as strategic as the rest of their financial investments. This may include gift and tax planning, multigenerational planning, estate planning, and the creation and management of donor advised funds, private foundations and charitable trusts. She also works extensively with nonprofit organizations, advising in the areas of gift planning, endowment management, social responsible/impact investing, and board governance.

Prior to joining Wells Fargo, Ms. Schoos spent four years at National Philanthropic Trust, a national donor-advised fund. She has deep knowledge of gifts of complex assets and has worked with wealth managers, attorneys, and other trusted client advisors to implement philanthropic solutions. Ms. Schoos began her career at Chase Manhattan Bank in 1986, and as part of J.P. Morgan Private Bank, she pioneered strategic philanthropic consulting for families and their foundations. Before joining Wells Fargo in 2016, she worked with the Social Impact Exchange, a nonprofit that helps scale proven solutions.

Ms. Schoos earned her Bachelor of Science with Marketing Concentration from Marymount College. She holds the Certified Trust and Financial Advisor (CTFA) and Charter Advisor in Philanthropy (CAP®) designations. A New York City native, Ms. Schoos is involved with organizations that empower women and girls through economic self-sufficiency, including The Grace Institute and Girls, Inc. A former board member of the Golda Club Westchester and Community Healthcare Network, she serves on The Metropolitan Museum of Art's professional advisory committee and the Support Center for Nonprofit Management's Leadership Council.

Jacqueline Valouch



Jacqueline Valouch is the Head of Wealth Planning and Philanthropy for Deutsche Bank Wealth Management based in New York. The group is comprised of in-house tax, trust and estate attorneys, and certified public accountants. Together, they advise clients in areas such as estate planning, tax planning, life insurance, art collections, philanthropy, and next-generation wealth education, including a focus on international and cross-border wealth planning. They also work closely on the estate and trust administration needs of wealthy families.

Ms. Valouch has over 20 years of experience in the wealth planning area. After nearly a decade in private practice, Ms. Valouch joined Fidelity Charitable where, for 15 years, she led a team of charitable planning experts, and advised individuals, families, and their advisors on how to incorporate charitable giving into their long-term planning goals.

Ms. Valouch has been featured as a subject matter expert at numerous conferences and panels on a variety of charitable planning topics. She holds a B.A. from the State University of New York at Albany and a J.D. from New York Law School, where she served as an adjunct professor of law teaching Charitable Organizations. Ms. Valouch sits on the Board of Directors for the Armory Foundation, is on the Executive Committee of WorkingNation, serves as a Leadership Advisor for Grace Farms Foundation and is also Co-Chair of the Lincoln Center Planned Giving Advisory Committee.

About the Moderator

Wendy Sealey



Wendy Sealey has over 20 years of non-profit management and fundraising experience, overseeing teams in the areas of leadership gifts, campaign fundraising, community outreach, and special events. Currently, she currently oversees a \$30 million fundraising program as Vice President for Development at the Guttmacher Institute, a leading research and policy organization committed to advancing sexual and reproductive health and rights (SRHR) worldwide.

Wendy is a sought-after fundraising coach, advisor, and speaker who has worked with a variety of nonprofits in New York City. Prior to joining the Guttmacher Institute, Wendy raised funds for the ACLU of NY, raising millions of dollars for their centennial campaign, East Harlem Tutorial Program's capital campaign, Bank Street College of Education's strategic initiative campaign, and the Astraea Lesbian Foundation's multi-million-dollar grant-making program.

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