United Jewish Endowment Fund

Endowment Fund

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Create a permanent legacy in your name or the name of a loved one, while strengthening the future of the Jewish people for generations.

At A Glance

- Provides annual income for the Jewish community
- Offers tax benefits for you or your estate
- May be created with a variety of assets

When you create an Endowment Fund, you are establishing a permanent fund in your name or in the name of someone you wish to honor or remember. The fund will be invested in a professionally managed portfolio. Each year, distributions from the fund will support important initiatives in the Jewish community, determined by the Trustees of the United Jewish Endowment Fund.

You may contribute cash, securities, or other property to establish a fund. Other gifts you may use to create your endowment fund include life insurance, charitable remainder trusts, charitable gift annuities, and retirement accounts (for example, IRAs). You may establish an endowment fund either during your lifetime or through your estate plan.

This type of gift offers many benefits. You may use the fund to honor or remember a loved one, and the fund will perpetuate that name forever. If you give during your lifetime, you may receive a charitable income tax deduction; if you make the gift through your estate plan, your estate may receive a deduction. Perhaps most important, however, is the enduring nature of a gift of an Endowment Fund.

The permanent legacy you create will provide a vital source of support to help meet the current and future critical needs of the community. Or, the endowment you establish may provide permanent resources to aid identified programs, projects, agencies, organizations, or initiatives that are of particular interest to you and your family.

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The United Jewish Endowment Fund of the Jewish Federation of Greater Washington strives to help our community provide an enriched Jewish life today and a vibrant Jewish tomorrow. The Endowment Fund connects philanthropists with opportunities to meet Jewish needs and *tikkun olam*—repairing the world. Together, we strengthen and advance Jewish life in the Greater Washington area and around the world.

The United Jewish Endowment Fund of The Jewish Federation of Greater Washington

- Generates permanent funds to support the work of our Jewish Federation family of agencies and beyond to the Greater Washington community;
- Catalyzes diverse funding sources to leverage our ability to meet Jewish needs and effect change in the broader community;
- Awards seed money to new and innovative initiatives for enriching Jewish life and for tikkun olam; and
- Furnishes funds for unanticipated and emergency needs locally and overseas.

The United Jewish Endowment Fund's Legacy Society recognizes those individuals who create a permanent fund of at least $10,000 to sustain the vitality and strength of our Jewish community. If you establish a fund of $200,000 or more, you will become a member of the national Star of David Society of the Jewish Federations of North America.

Contributions to the United Jewish Endowment Fund are tax deductible to the full extent the law allows.

This material is not intended to provide professional or legal advice. Please consult your advisors for professional advice.

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The Jewish Federation
OF GREATER WASHINGTON