



The Jewish Federation
OF GREATER WASHINGTON

United Jewish
Endowment Fund

Allied Professionals



Are you offering philanthropic services to your clients? The United Jewish Endowment Fund can help.

Over the next several decades, as baby boomers age and transfer their wealth to the next generation, an unprecedented \$41 trillion will change hands, according to researchers from the Social Welfare Research Institute at Boston College, whose report focuses on the 55-year period between 1998 and 2052.

Institutional Investor, September 13, 2012

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Beginning a conversation with your client about charitable giving can be as simple as asking, “Do you have a favorite charity or charities?” If the answer to that question is “yes,” you have the valuable opportunity to show your client the role that charitable giving can play in his or her individual financial and estate plans.

Talking points for opening the philanthropic conversation with your clients:

- Do you have a favorite charity or charities? *Endowments allow donors to support the causes that have been important to them during their lifetime, for generations. Donors can Create a Jewish Legacy working with The United Jewish Endowment Fund.*
- Do you give to more than one charitable cause? *UJEF can help through gifts supporting multiple charities.*
- Are you interested in creating a personal or family legacy in the community? *Name your endowment fund after your family or a loved one.*
- Would you like to learn about charitable giving options that will create both an income stream for you and/or another and give you a current charitable tax deduction? *You can suggest either a charitable remainder trust or a charitable gift annuity.*
- Have you considered establishing a private foundation? *UJEF offers donor advised funds and supporting organizations as alternatives to private foundations.*
- Do you care about the stewardship and financial management of your contributions? *The United Jewish Endowment Fund oversees the investment management of the funds.*
- Are you interested in involving multiple generations in your family’s philanthropy? *UJEF can work with you to identify your area of interest and philanthropic mission.*
- Would you like to advise on grant making? *A donor advised fund allows you to recommend charitable distributions.*

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Who to Look for:

- Donors of any age who have consistently given to the same non-profit the past several years.
- Donors aged 30-55 who could be candidates for the life insurance program or an Acorn Fund.
- Donors over 55 who have no children, spouse, partner or heirs, or whose children are well established.

Ways to Establish an Endowment:

- Gift of cash or other assets
- Bequest or trust distribution
- Gift of life insurance
- Gift of IRA or pension plans
- Charitable Lead Trust
- Charitable life income plans (CRUT, CRAT or CGA)
 - ◆ *Charitable Remainder Unitrusts, Charitable Remainder Annuity Trusts and Charitable Gift Annuities offer life income payments and a current tax deduction.*
 - ◆ *The remainder of the trust or annuity can be used to create an endowment fund.*

If your client has already included Federation/UJEF or our Create A Jewish Legacy partners in their plans, please let us know so that we can appropriately recognize and thank them for their commitment. Your client can reach out to us directly or give consent for you to contact our office on their behalf.

About Allied Professionals:

The United Jewish Endowment Fund's Allied Professionals attracts legal and financial professionals in Maryland, Virginia and Washington, DC to educational and networking events in an effort to broaden our reach to the professional community.

For additional resources for advisors along with the opportunity to receive our Advisor eNewsletter, please visit shalomdc.org/endowment or contact our UJEF professionals.

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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