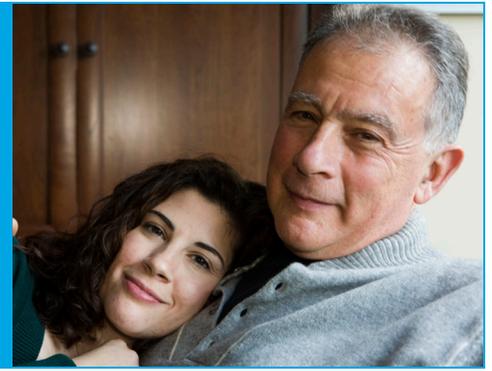




The Jewish Federation  
OF GREATER WASHINGTON

United Jewish  
Endowment Fund

# Charitable Bequest



Have you considered making a lasting gift to the Jewish community?

Create a legacy to help ensure the future of the Jewish community. Your *will* makes it possible.

## At A Glance

- Provides permanent resources for the Jewish community
- Can be established in your will or through a trust
- May be made in any amount—no matter how large or small
- May provide your estate with a tax deduction
- A permanent named fund may be established with a minimum gift of \$10,000
- Make a significant, lasting gift without affecting your finances during your lifetime

By including a bequest in your will or trust, your gift will last forever. It creates a permanent legacy for the Jewish community.

You can give a percent, an amount or a specific asset through your will or trust. The community can direct your gift to areas of greatest need, or you can choose a specific agency, field of interest or program to benefit from your bequest.

You may choose to make a gift of cash, securities, or other property—and your estate may receive a tax deduction in the

amount of your charitable bequest. If you have already drafted your will, your attorney can help you arrange a charitable bequest with a simple amendment or codicil. There is no limit on the amount you may set aside from your estate.

## Sample Bequest Language

“I give and bequeath \_\_\_\_\_% of my residuary estate or \$\_\_\_\_\_ to the United Jewish Endowment Fund of The Jewish Federation of Greater Washington (“the Endowment Fund”), located at 6101 Executive Blvd., Suite 100, North Bethesda, MD, 20852 (describe bequest).”

## Language to Create Specific Funds

### Memorial Endowment Fund

“This bequest shall be used to create a fund to be known as the (your name(s)) Fund (“the Fund”), from which distributions shall be made annually pursuant to the spending rate of the Endowment Fund as determined by the Trustees of the Endowment Fund from time to time. Such distributions shall be made at such times, in such amounts,

# Charitable Bequest

in such ways and for such charitable, educational or religious purposes (or any combination of such purposes) as the Trustees of the Endowment Fund shall determine.”

## **Perpetual Annual Campaign Endowment/ Lion of Judah Endowment Bequest (to support Federation's annual campaign)**

“This bequest shall be used to create a fund known as the (your name(s) Fund (“the Fund”), from which distributions shall be made annually pursuant to the spending rate of the Endowment Fund as determined by the Trustees of the Endowment Fund from time to time. The proceeds of this fund shall be designated to The Jewish Federation of Greater Washington’s annual campaign and shall be made in the name of the donor(s).

## **Field of Interest**

“This bequest shall be used to create a fund to be known as the (your name(s) Fund (“the Fund”), from which distributions shall be made annually pursuant to the spending rate of the Endowment Fund as determined by the Trustees of the Endowment Fund from time to time. Such distributions shall be devoted to the support of (name

particular charitable purpose). In the unlikely event that, in the judgment of the Trustees of the Endowment Fund, such use becomes unnecessary, incapable of fulfillment or inconsistent with the charitable needs of the Greater Washington Jewish community, the Fund shall be devoted to the general charitable purposes of the United Jewish Endowment Fund.”

## **Designated Agencies or Organizations**

“This bequest shall be used to create a fund to be known as the (your name(s) Fund (“the Fund”), from which distributions shall be made annually pursuant to the spending rate of the Endowment Fund as determined by the Trustees of the Endowment Fund from time to time. Such distributions shall be devoted to the support of (name particular charitable agency to be supported). In the unlikely event that, in the judgment of the Trustees of the Endowment Fund, such use becomes unnecessary, incapable of fulfillment or inconsistent with the charitable needs of the Greater Washington Jewish community, the Fund shall be devoted to the general charitable purposes of the United Jewish Endowment Fund.”

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.*

For more information, please contact:

**Elizabeth R. Goldstein, Esq.**  
**Deputy Director, United Jewish Endowment Fund**  
elizabeth.goldstein@shalomdc.org  
301-230-7228

**The Jewish Federation of Greater Washington**  
6101 Executive Blvd., Suite 100  
North Bethesda, MD 20852  
**PHONE** 301-230-7230 • **FAX** 301-230-7273  
**TTY** 301-230-7260  
**EMAIL** [endowment@shalomdc.org](mailto:endowment@shalomdc.org)  
**WEB** [www.shalomdc.org/endowment](http://www.shalomdc.org/endowment)



The Jewish Federation  
OF GREATER WASHINGTON