



## Legacy Giving Opportunities



CREATE A  
**JewishLegacy**  
JEWISH UNITED FUND/JEWISH FEDERATION  
OF METROPOLITAN CHICAGO

### GIFTS FROM YOUR ESTATE

#### Bequests In Your Will Or Trust

- ◆ The Jewish Community Centers of Chicago is here to help you.

*Sample bequest language:*

*I give X% of my estate (or \$X) to the Jewish Community Centers of Chicago Endowment Foundation.*

- ◆ If you already have a will, an attorney can help arrange a charitable bequest with a simple amendment or codicil
- ◆ Your estate may receive a tax deduction in the amount of the fair market value of your gift
- ◆ You can make a gift of a percentage or the remainder of your estate, a specific property or a specific dollar amount

#### Life Insurance

- ◆ Name the Jewish Community Centers of Chicago Endowment Foundation as an beneficiary
- ◆ Specify a percentage or the remainder of policy
- ◆ Contact your plan administrator for a "Change of Beneficiary" form

#### Retirement Plan (401(k) or IRA) Designation

- ◆ Name The Jewish Community Centers of Chicago Endowment Foundation as an after-lifetime beneficiary
- ◆ This is a tax-wise option, as distributions to heirs can be taxed extremely high (exceeding 70% in some cases) yet distributions to charity incur no taxes
- ◆ Specify a percentage or the remainder of the account
- ◆ Contact your plan administrator for a "Change of Beneficiary" form

### GIFTS YOU CAN GIVE NOW

#### Cash

- ◆ One-time or multi-year gift

#### Appreciated, marketable securities

- ◆ Incurs no capital gains tax
- ◆ Provides a tax deduction for the fair market value
- ◆ Can be donated to The Jewish Community Centers of Chicago Endowment Foundation to fund your legacy gift

*Please note that there are additional vehicles available, including those that provide income during your lifetime.*

The JCC Endowment Foundation was created in partnership with the Jewish Federation of Metropolitan Chicago's Agency Endowment Program, which was established to ensure that the Jewish Community Centers of Chicago and our sister agencies have the necessary resources to meet growing and evolving Jewish community needs. All commitments to the JCC Endowment Foundation are recognized as gifts to the Jewish Federation's Centennial Campaign.

JCC Chicago is a non-profit organization inspired by Jewish values, bridging traditions and generations to create a more vibrant, connected community. JCC is a partner with the Jewish United Fund in serving our community. ©2017 JCC Chicago