

GIVING OPTIONS

WAYS TO ASSURE JEWISH TOMORROWS

Have you considered making a lasting gift to YOUR Jewish Community?

The goal of legacy giving is to help you plan your estate and charitable giving in a way that benefits you, your family and charity. There are many ways you can make these planned gifts and enjoy tax and income benefits.

Your Gift	Your Goal	How It Works	Your Benefits
Bequest	Defer your charitable gift until after your lifetime. Preserve your ability to make modifications to your estate.	Name one or more community partners in your will or living trust, designating a specific amount or share (%) to your gift.	Estate tax charitable deduction. Life use and ownership of your property.
IRA or Retirement Plan Beneficiary Designation	Defer your charitable gift until after you lifetime. Preserve ability to make modifications to your gift. Dollars pass to charity income-tax free.	Name one or more of our community partners as a beneficiary of your retirement account. Complete a Change of Beneficiary form.	Estate tax charitable deduction. Lifetime use of asset/income. Continue to withdraw RMD during your lifetime. Avoid or reduce income taxes to heirs.
Life Insurance	Make a future gift of a specific amount with reduced current cash outlay to support a larger after-lifetime gift.	Purchase a new policy (or transfer an existing policy you no longer need) and name one or more of our community partners as owner and/or beneficiary.	Charitable deduction for premiums donated. Make larger gifts than you thought possible.
Cash	Make a gift to your community now.	Make a gift of cash, check, or credit card.	Immediate tax deduction for full value.
Charitable Remainder Trust (CRT)	Regular income for life or a term of years. Receive the benefit of tax savings from a charitable donation.	Transfer cash to fund a charitable trust and the trust provides you or a second annuitant with income for life or a term of years. Upon the end term, the remainder of the trust becomes your legacy gift to the charity(ies) you have named as the beneficiary.	Charitable deduction. Income for life or a term of years. Possible income growth over time. Avoidance of capital gains tax.

These descriptions are for informational only and do not constitute legal or tax advice. Please consult with your financial or estate planning professional to understand the implications of a gift to meet your legacy goals.

For more information, please contact:

Beth Keough, Director of Philanthropy
Jewish Federation of San Antonio
12500 N.W. Military Hwy, Suite 200
San Antonio, TX 78231
210.302.6813 | keoughb@jfsatx.org



Jewish Federation®
OF SAN ANTONIO



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A program of the HAROLD GRINSPOON FOUNDATION

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Designating a nonprofit organization as the beneficiary of your estate plan is easy. For your convenience, we have provided a list of the community partner organizations in the LIFE & LEGACY® initiative.

Organization Legal Name	Address	Federal ID #
Barshop Jewish Community Center	12500 N.W. Military Highway Suite 275 San Antonio, TX 78231	74-1152783
Chabad Center for Jewish Life & Learning	14535 Blanco Road San Antonio, Texas 78216	74-2659571
Congregation Agudas-Achim	16550 Huebner Road San Antonio, TX 78248	74-1356588
Congregation Rodfei-Sholom	3003 Sholom Drive San Antonio, TX 78230	74-1394415
Hebrew Free Loan Association of San Antonio	12500 N.W. Military Highway Suite 200 San Antonio, Texas 78231	74-6062120
Jewish Family Service of San Antonio	12500 N.W. Military Highway Suite 250 San Antonio, Texas 78231	74-1759254
Jewish Federation of San Antonio	12500 N.W. Military Highway Suite 200 San Antonio, Texas 78231	74-1109662
The Golden Manor, Inc. d/b/a San Antonio Jewish Senior Services	13409 N.W. Military Highway Suite 210 San Antonio, Texas 78231	74-6061449
Temple Beth-El	211 Belknap San Antonio, Texas 78212	74-1246242
Texas Hillel Foundation d/b/a Hillel San Antonio	12500 N.W. Military Highway Suite 200 San Antonio, Texas 78231	52-1758802
The Harry & Jeanette Campus of the San Antonio Jewish Community	12500 N.W. Military Highway Suite 275 San Antonio, Texas 78231	74-2759422

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