



The Jewish Federation  
OF WESTERN MASSACHUSETTS  
Serving Hampden, Hampshire & Franklin Counties

JEWISH ENDOWMENT  
FOUNDATION

# CHARITABLE BEQUEST

CREATE A JEWISH LEGACY

Your trust or will is a fundamental element of your estate plan. By deciding to leave a bequest from your will you can protect the people you love, create a lasting partnership with the Jewish Federation of Western Massachusetts and help ensure the future of the Jewish community.



# CHARITABLE BEQUEST

## CREATE A JEWISH LEGACY



Perpetuate  
your values  
and become  
a role model  
for future  
generations.

*For additional information, contact us at 413.737.4313. All inquiries are confidential.*

This material is presented for informational purposes only and should not be construed as legal, tax, or financial advice. When considering gift-planning strategies, you should always consult with your own legal and tax advisors.

*Jewish Federation of Western Mass  
1060 Dickinson Street  
Springfield, MA 01108*

### How does it work?

- You leave a gift to the Jewish Federation of Western Massachusetts, of a specific dollar amount, or a percentage of your estate or the residue of your estate.
- There is no limit on the amount that you can provide from your estate for a charitable bequest.
- Your bequest can include cash, securities or other property. Your estate may receive an estate tax deduction for your bequest.
- You may establish a testamentary charitable remainder trust or charitable gift annuity through your trust or will that provides payments to one or more designated beneficiaries, with the remainder going to the Federation upon their deaths.
- If you already have a trust or will in place, your attorney can prepare a simple amendment or codicil to provide for your bequest.
- You direct the Federation regarding allocation of your bequest. For example, you can create or augment an unrestricted endowment fund. If you're a Lion of Judah, you may want your legacy to live on through a Lion of Judah Endowment Fund. If Jewish education or some other particular cause is especially close to your heart, you can set up a special purpose fund. You can also create a donor advised fund or a supporting foundation.

### What are the benefits

- You invest in the future of the Jewish community.
- You perpetuate your values and become a role model for future generations.

*Here are some examples of typical bequest language in a trust or a will that you may wish to share with your legal counsel:*

#### **To make an unrestricted bequest to the Federation:**

I give \$\_\_\_\_ (or specified property) to the Jewish Federation of Western Massachusetts

#### **To make a bequest to the Federation to establish an endowed fund:**

I give \$\_\_\_\_ (or specified property) to the Jewish Federation of Western Massachusetts to establish a fund to be known as the "\_\_\_\_ Fund," subject to the Federation's rules governing the operation of endowment funds, the annual distribution from which shall be used to support (choose one or more):

- the Federation's unrestricted endowment fund
- the Federation's Annual Campaign
- a specific area of interest (e.g., Jewish education, children at risk, elder services)
- a particular partner agency or agencies of the Federation

#### **To add a bequest to an existing fund of the Federation:**

I give \$\_\_\_\_ (or specified property) to the Jewish Federation of Western Massachusetts to be added to the "\_\_\_\_ Fund," subject to the Federation's rules governing the operation of endowment funds.

#### **To make a bequest in a will to Partner Organization of the LIFE & LEGACY program:**

Upon my death, I give and bequeath \$\_\_\_\_ or \_\_\_\_% of my estate to the \_\_\_\_ (name of Legacy Partner organization) Legacy Partner Endowment Fund of the Jewish Federation of Western Massachusetts..