



**Jewish Community
OF GREATER
Foundation METROWEST NJ**

CHARITABLE BEQUEST

**Have you considered making a lasting gift
to your Jewish community but were concerned about how to do so?**

**Do you want to give something back
to your Jewish community but know you couldn't do it now?**

**Create a lasting partnership with your Jewish community to help ensure its future.
Your estate plan makes it possible.**

By including a bequest in your estate plan, your generosity will last forever. You will create a permanent legacy for the Jewish community.

You can specify that an amount or a percentage be donated through your will or trust. You can choose to support a specific agency or program or, you can allow the community to make decisions about the areas of greatest need.

You may choose to make a gift of cash, securities, or other property. Your estate will 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's no minimum on the amount you may set aside from your estate — all bequests to the Jewish community are valuable and appreciated.

Charitable Bequest

- Provides permanent resources to our Jewish community
- Established in your will or trust
- May be made in any amount, no matter how large or small
- Provides a tax deduction for your estate
- Your name will be permanently memorialized

How Will JCF MetroWest Handle Your Gift?

- A permanent fund will be established in your name (or in the name you specify)
- Your gift will be invested with all other JCF funds, in a professionally managed, well-diversified portfolio
- Each year, a distribution will be directed to the purpose you specify when you create the bequest

[Please turn this page over for additional information on Charitable Bequests.](#)

How Should A Bequest Be Worded?

“I give and bequeath \$ _____ (or _____% of my residuary estate) to the Jewish Community Foundation of Greater MetroWest NJ (“JCF”), located at 901 Route 10, Whippany, NJ 07981 (describe bequest).” The EIN for JCF is 22-1714130. JCF is the planned giving and endowment arm of Jewish Federation of Greater MetroWest New Jersey.

You Can Specify the Use of Your Bequest:

For a General Bequest (Unrestricted):

“This bequest shall be used to create a fund to be known as the [your name(s)] Fund, from which distributions shall be made annually pursuant to the spending rate of JCF as determined by trustees of JCF from time to time. Such distributions shall be made at such times, in such amounts, in such ways and for such charitable, educational or religious purposes (or any combination of such purposes) as the trustees of JCF shall determine.”

For a Perpetual Annual Campaign Endowment / Lion of Judah Endowment Bequest (Supporting the UJA Annual Campaign):

“This bequest shall be used to create a fund known as the [your name(s)] Fund from which distributions shall be made annually pursuant to the spending rate of JCF as determined by the trustees of JCF from time to time. Such distributions shall be designated to the UJA Annual Campaign and shall be made in the name of the donor(s).”

For a Field of Interest Fund (Restricted to Cause You Care About):

“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 JCF as determined by the trustees of JCF from time to time. Such distributions shall be devoted to support [name particular charitable purpose]. In the unlikely event that, in the judgment of the trustees of JCF, such use becomes unnecessary, incapable of fulfillment or inconsistent with the charitable needs of the Greater MetroWest Jewish community, the Fund shall be devoted to the general charitable purposes of JCF.”

For a Fund Designated to a Specific Agency or Institution:

“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 JCF as determined by the trustees of JCF 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 JCF, such use becomes unnecessary, incapable of fulfillment or inconsistent with the charitable needs of the MetroWest Jewish community, the Fund shall be devoted to the general charitable purposes JCF.”

For more information, please contact:

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