



Jewish Federation  
OF GREATER INDIANAPOLIS

Planned Giving  
and Endowment

THE **STRENGTH** OF A PEOPLE.  
THE **POWER** OF COMMUNITY.

# ENDOWMENT FUND

CREATE A JEWISH LEGACY

Create a permanent legacy in your name or the name of a loved one, while strengthening the future of the Jewish people for generations.



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# Endowment Fund

CREATE A JEWISH LEGACY

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Create a permanent legacy to honor or remember someone in perpetuity.

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*For additional information, contact Josh Lodolo at (317) 715-9266. 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.

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## At a Glance

- May be established during your lifetime or through your will or other charitable gift planning vehicles.
- Provides annual income for the Jewish community.
- May offer tax benefits for you or your estate.
- May be created with a variety of assets.

When you create an Endowment Fund, you are establishing a permanent fund in your name or in the name of someone you wish to honor or remember. The fund will be invested in a professionally managed portfolio. Each year, distributions from the fund will support important initiatives in the Jewish community.

You may establish an endowment fund either during your lifetime or through your estate plan.

This type of gift offers many benefits. You may use the fund to honor or remember a loved one, and the fund will perpetuate that name forever. If you give during your lifetime, you may receive a charitable income tax deduction; if you may the gift through your will or estate plan, your estate may receive the deduction. Perhaps most important, however, is the enduring nature of a gift of an Endowment Fund.

The permanent legacy you create will provide a vital source of support to help meet the current and future critical needs of the community. Or, the endowment you establish may provide permanent resources to aid identified programs, projects, agencies, organizations, or initiatives that are particular interest to you and your family.

## What Else Do I Need To Know?

If your gift is over the minimum threshold amount for a named fund, you can create a permanent named fund and direct your gift to support the annual campaign (Perpetual Annual Campaign Endowment/ Lion of Judah Endowment) or choose an agency, field of interest or program to benefit from your generosity.

Ways to establish an endowment:

- Gift of cash or other assets
- Bequest or trust distribution
- Gift of life insurance
- Gift of IRA or pension plans
- Charitable life income plan

*A charitable remainder trust or charitable gift annuity offers life income payments and a current tax deduction. The remainder of the trust or annuity can be used to create an endowment fund.*