



PLANNED GIVING

Secure the future
of our Jewish
community

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Three easy ways to create a planned gift with CJP:

■ BEQUEST BY WILL OR TRUST

A charitable bequest is the easiest and most efficient way to leave a legacy gift to CJP. By means of your will, trust, or other estate plan you can:

- Name CJP to receive a percentage of your estate.
- Leave CJP a specific dollar amount.
- Retain full control and use of your assets during your lifetime.
- Modify your bequest if your circumstances change.

■ RETIREMENT PLAN ASSETS

You may designate CJP as a beneficiary of a qualified retirement plan, such as an IRA, 401(k), or 403(b). To do so, simply contact your retirement plan administrator and complete the appropriate beneficiary designation form.

- By naming CJP as a beneficiary, you may avoid significant, often unanticipated, estate and income taxes that would otherwise be paid by your heirs.
- You may choose CJP as a contingent beneficiary of your retirement plan, in which case CJP will receive your retirement plan assets only after your spouse (or another designated primary beneficiary) has passed away.

■ DONOR ADVISED FUND (DAF)

Using an existing DAF at CJP or at another institution is a straightforward way to leave a legacy gift to CJP.

- Name CJP as the beneficiary of a percentage of your remaining DAF balance.
- Consider a bequest to an existing DAF, with a standing recommendation to make a grant to CJP.
- Since the funds are already held at a charity, there is no need to use a will or trust to fulfill your legacy gift intention.



DOR L'DOR

By letting us know your plans, we can thank and recognize you. Your planned gift makes you eligible for membership in CJP's *Dor L'Dor: Planned Gift and Bequest Society*. You may also remain anonymous; be assured that CJP will honor your wishes.

For more information or to have a confidential conversation about legacy giving at CJP, please contact Charlie Glassenberg or Ethan Kernkraut:

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You can give with confidence. CJP has received the highest 4-star rating from Charity Navigator, reflecting our efficient and fiscally responsible management.

CJP does not provide tax, financial, or investment advice. If you have any tax, investment, or financial questions, please consult a qualified advisor or counsel.

CJP welcomes the participation of interfaith couples and families, and people of all abilities, backgrounds, and sexual orientations.



Make a bigger difference.

Combined Jewish Philanthropies

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