

# Ensure OUR FUTURE



## Quick Reference Guide to Planned Giving

Your Goal	Your Gift	Your Benefits	How to make the gift
Defer a gift until after your lifetime	Bequest	Donation exempt from federal estate tax Control of your assets for your lifetime	Name us in your will or living trust. (Designate a specific amount, percentage, or share of the residue.)
Make a quick and easy gift	Outright Gift of Cash	Immediate income tax deduction Removes property from estate	Simply write a check or make a cash donation now
Avoid tax on capital gains	Outright Gift of Securities	Immediate charitable deduction Avoidance of capital gains tax	Contribute long-term appreciated stock or other securities
Avoid the two-fold taxation on IRA's or other employee benefit plans	Gift of Retirement Assets	Allows you to make the gift from the most highly taxed assets leaving better assets for the family	Name us as the beneficiary of the remainder of the assets after your lifetime
Make a large gift with little cost to yourself	Gift of Life Insurance	Current income tax deduction Possible future deductions through gifts to pay policy premiums	Change ownership on a life insurance policy no longer needed



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Give your personal residence now, but continue to live there	Retained Life Estate	Valuable charitable income tax deduction Lifetime use of the residence	Designate ownership of your home to us, but retain occupancy
Make a gift of property no longer needed and generate an income tax deduction	Gift of Real Estate	Immediate income tax deduction Reduction or elimination of capital gains tax	Donate the property to us
Secure a fixed and often increased income, or create a hedge against inflation	Charitable Remainder Trust	Variable or fixed income for life Immediate charitable income tax deduction	Create a trust the pays income annually, principal is retained for the Foundation
Reduce gift and estate taxes on assets you pass to children or grandchildren	Charitable Lead Trust	Reduces your taxable estate property kept by your family often with reduced gift taxes	Create a charitable trust the pays fixed or variable income to us for a specific term in years, principal is retained for heirs
Supplement income with steady payments that are partially tax free	Charitable Gift Annuity	Current and future savings on income taxes Fixed payments for life for one or two individuals	Establish a charitable gift annuity contract with us that pays a set amount for life

For more information about these planned giving options, please contact Sharon Kenigsberg at 562-426-7601 EXT 1008 or [sharonk@jewishlongbeach.org](mailto:sharonk@jewishlongbeach.org)



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