

RETIREMENT ASSETS

CREATE A JEWISH LEGACY

When you designate the Jewish Federation of Madison as a beneficiary of your retirement assets, you are leaving a legacy that will secure the future of the Jewish community and can reduce taxes paid by your heirs.



Jewish Federation
OF MADISON

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

www.JewishMadison.org
(608) 278-1808

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Support the future of the Jewish community and reduce taxes paid by your heirs.

For additional information, contact Lynn Kaplan, Financial Resource Development Director at (608) 442-4076. 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.

What is it?

- Retirement plan assets include corporate pension and profit-sharing plans, Keogh plans, 401(k) plans, 403(b) plans and Individual Retirement Accounts (IRAs).

How does it work?

- You notify your plan administrator that you would like to name the Jewish Federation of Madison as a full or partial beneficiary of your retirement assets and complete a change of beneficiary form.
- Alternatively, you may use your retirement assets to fund a charitable remainder trust or charitable gift annuity at your death. The trust or annuity can then provide income to one or more designated beneficiaries for life or a term of years. When the trust or annuity ends, the Federation receives the remaining assets.
- You direct the Federation regarding the allocation of your gift—for example, to create or augment an unrestricted endowment fund, a Lion of Judah Endowment fund, a special purpose fund, a donor advised fund or a supporting foundation.

What are the benefits?

- Your retirement assets are a tax-wise asset to use for charitable giving as they are subject to both estate tax at the time of your death and income tax when distributed to beneficiaries.
- You invest in the future of the Jewish community and serve as a role model for future generations.