

Legacy Giving Options

CHOOSE THE GIVING VEHICLE THAT MATCHES YOUR LEGACY GOALS:

YOUR WILL

- A gift in your will can be a specific dollar amount, a percentage of your estate or an asset such as real estate, securities or other property.
- Sample language may include:
I give, devise and bequeath \$ _____
or _____% of my residuary estate to _____
(insert organization name, Federal Tax ID number, city and state)

YOUR RETIREMENT ASSETS

- Include one or more charities as after-lifetime beneficiaries with a gift of a percentage of your account.
- If you have an existing plan, contact your plan administrator and request a Change of Beneficiary form.
- Retirement assets can be heavily taxed when they pass to your heirs. If you give them to a charity, they pass tax free.

YOUR LIFE INSURANCE

- Donate a new policy or an existing policy that is no longer needed.
A new policy where the charity is the owner and beneficiary may provide you current tax advantages.
- Name one or more charities as after-lifetime beneficiaries.
You can donate a percentage of the policy or a specific dollar amount.

YOUR OTHER OPTIONS

- Designate the remainder of a Donor Advised Fund or private foundation.
- Establish a fund at the Lehigh Valley Jewish Foundation to receive your legacy gift that will distribute to organizations of your choice.
- Create a fund now with appreciated securities, cash or other assets (real estate, mineral rights, royalty interest, etc.).
- If you are over 70 ½, you can establish a legacy gift today by using the IRA charitable rollover.

These descriptions are informational only and do not constitute legal or tax advice. Please consult with a financial or estate planning professional to understand the implications of a gift for your particular goals.



LEHIGH VALLEY
JEWISH FOUNDATION

THE JEWISH COMMUNITY'S ENDOWMENT FUND
Jewish Federation of the Lehigh Valley

For more information, contact
Jim Mueth at the Jewish Federation
at 610-821-5500 or jjim@jflv.org

LIFE &
LEGACY™
Assuring JEWISH TOMORROWS
A program of the HAROLD GRINSPOON FOUNDATION

Legacy Giving Options

DESIGNATING A NONPROFIT ORGANIZATION as the beneficiary of your estate plan is easy. For your convenience, we have provided a list of the community partner organizations in the LIFE & LEGACY program.

ORGANIZATION LEGAL NAME & ADDRESS	FEDERAL ID #
Congregation Am Haskalah 1190 W. Macada Road, Bethlehem, PA 18017	23-2075551
Congregation Brith Sholom 1190 W. Macada Road, Bethlehem, PA 18017	24-0795950
Congregation Keneseth Israel 2227 Chew Street, Allentown, PA 18104	23-1489807
Congregation Sons of Israel 2715 Tilghman Street, Allentown, PA 18104	23-1671092
Jewish Community Center of Allentown 702 North 22nd Street, Allentown, PA 18104	23-0734200
Jewish Day School of the Lehigh Valley 2313 Pennsylvania Street, Allentown, PA 18104	23-7344525
Jewish Family Service of the Lehigh Valley 2004 West Allen Street, Allentown, PA 18104	23-2301360
Jewish Federation of the Lehigh Valley 702 North 22nd Street, Allentown, PA 18104	23-6396949
Temple Beth El 1305 Springhouse Road, Allentown, PA 18104	23-1445621
Temple Covenant of Peace 1451 Northampton Street, Easton, PA 18042	24-0856312



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