

FULFILLING YOUR LEGACY PROMISE

1. PROMISE

You decide that you want to leave something to the Jewish community – for your local community, your camp, your synagogue, Israel, or elsewhere. At this moment you have probably not decided exactly how you will fund your legacy, nor precisely which causes or organizations will be the beneficiaries.

2. HONOR

You share your personal statement [always optional] about why you have created this legacy plan or your hopes for the future. In it you may speak of your grandparents, to your grandchildren, or about the organizations that have benefited from your volunteering, your charitable support and your leadership.

3. FORMALIZE

You specify how you will fund your legacy through counsel from your financial and tax advisor. The vehicle might be through a bequest, insurance, a beneficiary designation of your IRA or other pension asset, or by establishing a life income plan. It is when you formalize that you can be assured your wishes will truly happen.

4. FUND

Your ideal becomes reality because you have planned well. Your funds come to the community – into a permanent endowment fund in your family name – for causes and beneficiaries that you have designated. You have kept your promise to the community that you love. It will now be there, stronger, for those you leave behind.