

# Charitable Bequest



Have you considered making a lasting gift to the Jewish community?



Create a legacy to help ensure the future of the Jewish community. Your *will* makes it possible.

## Charitable Bequest at a Glance

- Provides permanent resources for the Jewish community
- Can be established in your will or through a trust
- May be made in any amount — no matter how large or small
- May provide your estate with a tax deduction
- Provides income for an area of interest or charity of your choice
- A permanent named fund may be established with a minimum gift of \$10,000
- Make a significant, lasting gift without affecting your finances during your lifetime

## More Information About the Charitable Bequest

By including a bequest in your will or trust, your gift will last forever. It creates a permanent legacy for the Jewish community.

You can give a percent, an amount or a specific asset through your will or trust. The community can direct your gift to areas of greatest need, or you can choose a specific agency, field of interest or program to benefit from your bequest.

You may choose to make a gift of cash, securities, or other property — and your estate may receive a tax deduction in the amount of your charitable bequest. If you have already drafted your will, your attorney can help you arrange a charitable bequest with a simple amendment or codicil. There is no limit on the amount you may set aside from your estate.

## Sample Bequest Language

“I give and bequeath \_\_\_% of my residuary estate or \$\_\_\_ to the Jewish Community Foundation of The Jewish Federation of Greater Washington (“the Foundation”), located at 6101 Executive Blvd., Suite 100, North Bethesda, MD, 20852 (describe bequest, if appropriate.)”

## Language to Create Specific Funds

### MEMORIAL ENDOWMENT FUND

“This bequest shall be used to create a fund to be known as the (your name(s)) Fund (“the Fund”), from which distributions shall be made annually pursuant to the spending rate of the Foundation as determined by the Trustees of the Foundation from time to time. Such distributions shall be made at such times, in such amounts, in such ways and for such charitable, educational or religious purposes (or any combination of such purposes) as the Trustees of the Foundation shall determine.”

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## PERPETUAL ANNUAL CAMPAIGN ENDOWMENT/LION OF JUDAH ENDOWMENT BEQUEST (TO SUPPORT FEDERATION'S ANNUAL CAMPAIGN)

"This bequest shall be used to create a fund known as the (your name(s)) Fund ("the Fund"), from which distributions shall be made annually pursuant to the spending rate of the Foundation as determined by the Trustees of the Foundation from time to time. The proceeds of this fund shall be designated to The Jewish Federation of Greater Washington's Annual Campaign and shall be made in the name of the donor(s).

## FIELD OF INTEREST

"This bequest shall be used to create a fund to be known as the (your name(s)) Fund ("the Fund"), from which distributions shall be made annually pursuant to the spending rate of the Foundation as determined by the Trustees of the Foundation from time to time. Such distributions shall be devoted to the support of (name particular charitable purpose). In the unlikely event that, in the judgment of the Trustees of the Foundation, such use becomes unnecessary, incapable of fulfillment or inconsistent with the charitable needs of the Greater Washington Jewish community, the fund shall be devoted to the general charitable purposes of the Jewish Community Foundation."

## DESIGNATED AGENCIES OR ORGANIZATIONS

"This bequest shall be used to create a fund to be known as the (your name(s)) Fund ("the Fund"), from which distributions shall be made annually pursuant to the spending rate of the Foundation as determined by the Trustees of the Foundation from time to time. Such distributions shall be devoted to the support of (name particular charitable agency to be supported). In the unlikely event that, in the judgment of the Trustees of the Foundation, such use becomes unnecessary, incapable of fulfillment or inconsistent with the charitable needs of the Greater Washington Jewish community, the Fund shall be devoted to the general charitable purposes of the Jewish Community Foundation."

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## FOR MORE INFORMATION, PLEASE CONTACT:

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## THE JEWISH COMMUNITY FOUNDATION BY THE JEWISH FEDERATION OF GREATER WASHINGTON

6101 Executive Boulevard, Suite 100 | North Bethesda, MD 20852  
**PHONE:** 301-230-7230 **WEB:** shalomdc.org/foundation **EMAIL:** foundation@shalomdc.org

Updated December 2023

The Jewish Community Foundation partners with and inspires philanthropists and the Greater Washington community to advance a thriving, equitable world where all people can reach their full potential.

Combining Jewish values with personalized service, we inspire generosity, support philanthropists in maximizing their impact, and build and participate in learning and funding communities to make systemic, lasting change for generations to come — within and beyond the Jewish community.

## TURN TO THE JEWISH COMMUNITY FOUNDATION FOR:

- Support with giving to your favorite causes within and beyond the Jewish community
- Building a permanent legacy to support the work of Federation's family of agencies and the Greater Washington community
- Access to philanthropic and intergenerational learning programs ground in Jewish values and teachings
- Collaborative giving opportunities to amplify your impact
- Personal, impact-focused philanthropy advisory services
- Tax-advantaged gift options

*The Jewish Community Foundation and The Jewish Federation of Greater Washington do not provide legal, financial, or tax advice. Donors are encouraged to seek independent tax and legal counsel.*