



Discover How Everyone Benefits from Planned Gifts

Your Goal	Your Gift	Your Method	Your Benefit
Make a gift while leaving more of your estate to your heirs	Gifts of Retirement Assets (e.g., 401-K, IRA)	Name us as the beneficiary of your retirement plan, and pass less-taxed assets to your heirs	Avoid up to 60% income tax on your retirement assets, pass more of your estate to your heirs
Make a gift while avoiding capital gains liability	Gifts of Appreciated Securities	Give us appreciated stocks, bonds or mutual funds to sell and use the proceeds	Make a significant income tax deduction, pay no capital gains tax
Make a gift that costs you nothing during your lifetime	Gifts through your will or trust ("bequest")	Include a gift of cash, property, or a share of your estate through your will or trust	A gift that does not affect your cash flow, and you can adjust your gift as circumstances change
Make a gift and receive a steady income for life	Charitable Remainder Unitrust, Charitable Remainder Annuity Trust	Share your assets with us in a plan that gives you an income for life and passes us the remainder	Diversify assets, avoid or defer capital gains tax, receive charitable tax deduction, secure often greater income and possible inflation protection
Make a large gift at little cost	Gift of Life Insurance	Donate a life insurance policy you no longer need or name us in an existing one	Take a tax deduction now, take possible future deductions through gifts to pay policy premiums
Make a gift that preserves your assets for your heirs	Charitable Lead Trust	Use appreciating assets to create a trust that will pay us income for a period of years, and then pass the assets back to you or your heirs	Shelter your growing assets and benefit the Jewish community right away, reduce or eliminate gift and estate tax
Plan a future gift in the simplest way possible	Gift the balance of your account (POD or TOD)	Designate the balance of your bank or brokerage account, retirement plan, annuity or life insurance policy to us	Make an extraordinary contribution that costs you nothing now and is as simple as signing your name

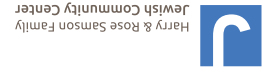
Donors seeking tax or legal advice should consult with their own professional advisors. Adapted from PlannedGiving.com

For more information contact: Caren Goldberg, Executive Director, Jewish Community Foundation
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The Joseph and Rebecca Feltz Center for Jewish Life



Create a Jewish Legacy, a program of the Jewish Community Foundation of the Milwaukee Jewish Federation, is a collaborative effort of the following area synagogues, agencies and day schools:



CREATE A Jewish Legacy

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