

CHARITABLE BEQUESTS

It is easy to make a charitable bequest through a provision in your estate plan. There are several designations you can make to benefit the Jewish Federation, the Jewish United Fund, and its agencies and beneficiaries.

How does it work?

- You may leave a bequest of a specific cash amount, specific property, or a percentage of your estate.
- There is no limit on the amount that can be provided from your estate for charitable purposes.
- Your estate will receive a charitable tax deduction for the amount of the gift, reducing your taxable estate.
- If your will is already written, you can have a simple amendment (codicil) added to provide a charitable bequest to the Jewish Federation.
- We would be happy to review any gift terms or discuss additional designations.

How to leave a bequest

Below is suggested bequest language that may be incorporated in estate planning documents:

- **To establish an unrestricted endowment gift:**

I give \$_____ (or specified property) or ____% of the residue of my estate to the Jewish Federation of Metropolitan Chicago as an unrestricted gift.

- **To establish an outright bequest to the Jewish United Fund Annual Campaign:**

I give \$_____ (or specified property) or ____% of the residue of my estate to the Jewish United Fund of Metropolitan Chicago as an unrestricted gift.

- **To establish a JUF Annual Campaign Continuity Fund:**

I give \$_____ (or specified property) or ____% of the residue of my estate to the Jewish United Fund of Metropolitan Chicago as a Campaign Continuity Fund, to be distributed on an annual basis to the Jewish United Fund Annual Campaign. (Gifts must be at least \$100,000)

- **To establish a Lion of Judah Endowment:**

I give \$_____ (or specified property) or ____% of the residue of my estate to the Jewish United Fund of Metropolitan Chicago as a Lion of Judah Endowment gift, to be distributed on an annual basis to Women's Philanthropy through the Jewish United Fund Annual Campaign. (Gift must be at least \$125,000)

- **To establish an endowment to benefit a specific Jewish Federation of Metropolitan Chicago agency or area of interest:**

I give \$_____ (or specified property) or ____% of the residue of my estate to the Jewish Federation of Metropolitan Chicago, to be held for the benefit of _____ (name agency or describe a special field of interest).



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CHICAGO
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The Jewish United Fund/Jewish Federation of Chicago does not provide legal advice. Please consult your tax or financial advisor and seek independent legal counsel.