



Seven Easy Ways To Leave a Legacy

Be a Philanthropist Within Your Community

1. Simple Bequest in a Will or Trust Provision

You can make a bequest in your will or add a provision in your trust for a gift to Temple Beth Hatfiloh's endowment.

2. IRA or other qualified Retirement Plan

You can contribute to our existing endowment by naming Temple Beth Hatfiloh as one of the beneficiaries of an existing IRA or other qualified retirement plan. You can choose a dollar amount or percentage.

3. Life Insurance Policy

If you hold an existing life insurance policy or purchase a new life insurance policy, you can name Temple Beth Hatfiloh as owner and/or one of the beneficiaries. The cost of such a policy depends on your age and health.

4. Grant from a Donor Advised Fund (DAF), Private Foundation or Supporting Foundation

Recommend a grant from your donor advised fund, or make a grant from your private foundation or supporting foundation to Temple Beth Hatfiloh's endowment. Grants can be made during your lifetime and/or after your death.

5. Cash or Marketable Securities

Make a present-day gift of cash or marketable securities to Temple Beth Hatfiloh's endowment fund.

6. Real Estate or other property

Subject to Temple Beth Hatfiloh's real estate or gift acceptance policy, you are able to donate real estate or other property to our endowment fund.

We will pay you to be a philanthropist...

There are ways to both leave a legacy and earn income. They include:

7. Life Income Plans:

Charitable Gift Annuity (CGA)—immediate or deferred

Transfer cash or property, create lifetime payments for yourself

Charitable Lead Trust (CLT)

Donate assets to a trust, pay income to a charity, transfer remainder to family to reduce taxes

Charitable Remainder Trust (CRT)

Donate assets to a trust, receive income, transfer remainder to a charity to reduce taxes

If you are interested in any of these options, please talk to your tax advisor and/or estate planner to discuss which may best suit your legacy desires.