

How Do I Leave a Legacy to Temple Beth-El?

Will or Living Trust

A bequest through your will or living trust can be in the form of a specific dollar amount, percentage of your estate, or specific assets (such as certain securities).

IRA/Keogh/Retirement Plans

Name Temple Beth-El as a beneficiary of your IRA, Keogh, or other qualified retirement plan. As these assets are subject to both estate and income taxation if left to your heirs, they are especially good assets for charitable giving.

Life Insurance

Name Temple Beth-El as a beneficiary of any life insurance policy on your life, or make it the owner of a policy you now own. If you transfer the policy to Temple Beth-El during your lifetime, you may receive a current income tax deduction for the value of the policy.

Gift Annuity/Charitable Remainder Trust

You can receive a stream of income for a term of years or the rest of your life while ultimately leaving a gift to Temple Beth-El. You may be eligible for a current charitable deduction for income tax purposes. You also may be able to sell appreciated assets without paying any capital gains tax at the time of the sale.

Your personal accountant or investment manager can help you choose the vehicle that is most meaningful and beneficial for you. If you would like a list of resources from Temple Beth-El, please contact Laurie Orenstein at 847.205.9982 ext. 211 or lorenstein@templebeth-el.org.