

What is an endowment fund?

An endowment fund provides a way for members and friends of Congregation Rodeph Sholom to give a monetary gift that will permanently help develop and sustain the congregation now and in the future.

Your gift to the Legacy Endowment Fund is a way to make your gift last forever.

Endowment funds will:

- Become part of our permanent endowment.
- Generate earnings that will provide income for programs and operations.
- Fund programs and social causes.
- Offset administrative costs.

Endowment funds provide donors an opportunity to:

- Make a permanent gift from lifetime assets.
- Provide on-going support for Congregation Rodeph Sholom.
- Leave a legacy that will be remembered over time.

WHO ARE WE?

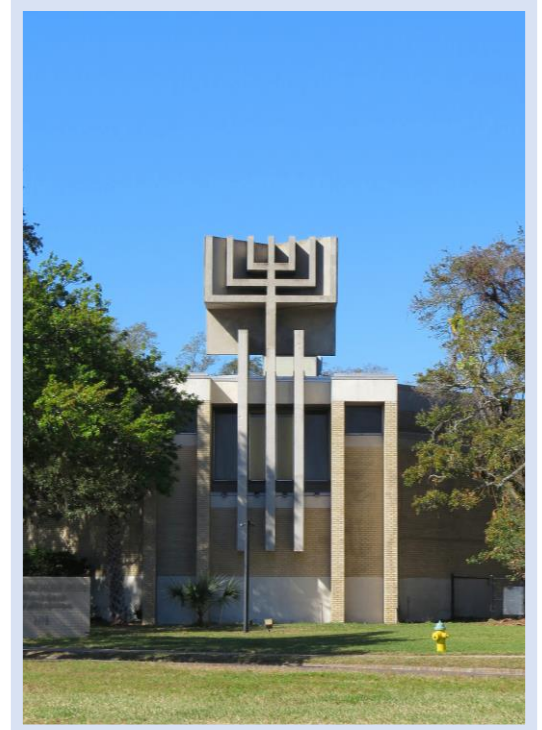
Congregation Rodeph Sholom is an active, multi-generational, conservative synagogue that was founded in 1903. Our membership includes approximately 400 families.

We feature a longstanding religious school and opportunities for adult education.

Our success is a direct result of our commitment to Judaism and our members who learn, pray, socialize together, and support Jewish values in the community.

Congregation Rodeph Sholom is the premier conservative synagogue in Tampa.

**Congregation
Rodeph Sholom**
2713 Bayshore Boulevard
Tampa, Florida 33629
813-837-1911



**LEGACY
ENDOWMENT
FUND**

Congregation Rodeph Sholom Legacy Endowment Fund

What makes this gift different from other forms of synagogue giving?

Our Legacy Endowment Fund is a permanent fund, and only its earnings will be spent. When funds are available and distributed, they will support projects above and beyond normal budgeted items, as well as ongoing operations.

Management of the Endowment

All Congregation Rodeph Sholom endowment funds are placed with the Tampa-Orlando-Pinellas (TOP) Jewish Foundation, a tax exempt Jewish community foundation, which provides professional investment management and administration. The TOP Jewish Foundation was established to assist the Jewish communities of Tampa, Orlando and Pinellas county with endowment planning, management and administration. TOP's assistance has been very valuable to our synagogue and should be even more so as our Endowment grows.

FOR MORE INFORMATION ABOUT
ENDOWMENT OPPORTUNITIES CONTACT
THE RABBI, EXECUTIVE DIRECTOR, OR
SYNAGOGUE PRESIDENT AT (813) 837-1911.

The purpose of the information contained herein is intended to provide information of a general character and inform the congregation that many benefits for planned giving exist. The Synagogue is not engaged in rendering legal or tax advisory services. For advice and assistance in specific cases, you should retain the services of an attorney or other professional advisor. State law governs wills, trusts, etc., and advice from legal counsel should be sought when considering these matters.

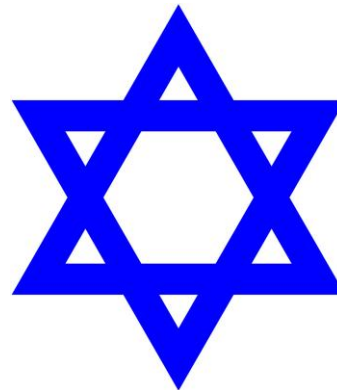
What kinds of gifts can be made to our endowment fund?

There are many types of gifts that could benefit our permanent endowment fund. A few of them are:

- *Wills*
- *Trusts*
- *Real estate*
- *Personal property*
- *Stocks and bonds*
- *Life insurance*
- *Planned gifts*
- *Cash*

Is my gift too small?

Every gift contributes to the overall growth of the principal amount, which compounds the return on investments. Because all gifts are pooled in the fund, they have a cumulative effect, making even the smallest gift significant.



What is a planned gift?

A planned gift to the synagogue is a financial gift structured to serve the needs of the synagogue as well as the donor, such as:

- *Life Insurance* through naming Congregation Rodeph Sholom as the beneficiary or transferring ownership to Congregation Rodeph Sholom.
- Gifts through *wills*, also known as *bequests*.
- *Charitable remainder* and *charitable lead trusts* to support our permanent endowment fund.

Can I designate a special type of gift?

Specially designated gifts are a great way to show others how much you care about them and Congregation Rodeph Sholom. These can include:

- *Memorial gifts* in remembrance of a family member or a congregant member.
- *Tribute gifts* recognizing special occasions such as anniversaries, achievements, retirements and promotions.