

“WE PUT OUR ESTATE PLANS TOGETHER WHEN OUR KIDS WERE YOUNG, WHEN WE WERE THINKING ABOUT WHAT WAS IMPORTANT TO US. THE INSTITUTIONS THAT WERE MEANINGFUL TO OUR FAMILY WERE INCLUDED IN OUR WILL BECAUSE WE WANTED TO MAKE SURE THAT OUR VALUES WOULD CONTINUE TO BE EXPRESSED AFTER WE ARE GONE.”

**— Builders Circle Members
Chris and Tim Taich**



FREQUENTLY ASKED QUESTIONS

Q. What is Legacy Giving?

A. Legacy giving describes a variety of giving vehicles including bequests, retirement fund beneficiary designations or charitable remainder trusts that allow you to support Beth Am and other charitable organizations after your death. Depending on the value of your estate and the laws in place the year of your death, a legacy gift may reduce your estate’s taxable assessment for your heirs. Some giving methods are more advantageous than others to achieve your personal financial and philanthropic objectives, so it is important to consult your attorney or tax advisor.

Q. If I make a legacy gift, where do my dollars go?

A. While legacy gifts may be designated to most named funds or specific programs of the congregation, we encourage our members to designate bequests and other legacy gifts to the Fund for the Future Endowment. This will guarantee that your gift continues to support our community in perpetuity, while ensuring future leadership the funds that are the most flexible for congregational programs well into the future. Unless otherwise designated, all gifts of \$5,000 or more will automatically be directed to the endowment.

Q. Is there a minimum requirement for legacy giving?

A. Anyone can make a legacy gift, of any size. Our legacy donors range from members who have modest means to the very wealthy, and everything in between. Every legacy gift is an important expression of love for our community, and, when directed to our endowment, will grow and support Beth Am in perpetuity.

Q. What is suggested bequest language?

A. I give to the Fund for the Future Endowment of Congregation Beth Am, 26790 Arastradero Road, Los Altos Hills, CA 94022, the sum of \$ _____ [or _____% of] [or describe the property].

For a confidential conversation about your giving options, please contact Mandy Eisner, Director of Development, in the Beth Am office at (650) 493-4661, ext. 504 or mandy_eisner@betham.org, or simply return the enclosed postcard.

26790 Arastradero Road, Los Altos Hills, CA 94022
(650) 493-4661 | www.betham.org/LEGACYGIVING





LEGACY GIVING AT BETH AM

A gift to Beth Am through your estate plans can be a meaningful way to show your appreciation of our sacred community and help ensure that we continue to thrive for the generations to come.

Legacy gifts to our general endowment, the Fund for the Future, help Beth Am provide lifelong education, worship, social action and other opportunities for our members at all stages of their lives, regardless of their ability to pay.

Most legacy gifts do not affect your cash flow today — and for many donors, create an opportunity to make a larger gift than was possible during their lifetime.

If you have already included Beth Am in your estate plans, thank you. Please let us know so that we can show our appreciation and invite you to join our Builders Circle, the group of your fellow members who have already notified us of their legacy gifts. There is no minimum gift — legacy giving is for everyone, at every level of philanthropy.

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"I DID NOT FIND THE WORLD DESOLATE WHEN I ENTERED IT. AND AS MY ANCESTORS PLANTED FOR ME BEFORE I WAS BORN, SO DO I PLANT FOR THOSE WHO WILL COME AFTER ME."

— Talmud Ta'anit 23a

