



LEGACY SOCIETY

Members of the Legacy Society are donors who make an outright planned gift to the FJMC Foundation for Jewish life. The receipt of a signed letter of intent entitles the donor

to the designation of "Legacy Society Member." Legacy Society members will receive special recognition and will be invited to special events of the Foundation. There are many ways to participate and it is recommended that you discuss your participation with an estate planning professional. Some of the ways to participate include:

Bequests: After providing for your loved ones, a bequest specifies a gift in your will to the Foundation. Your gift may be a specific dollar amount; a percentage of a remaining amount; a residuary; or a particular asset such as a publicly traded security.

A Charitable Trust: A Charitable Trust is a gift arrangement defined by federal tax law that enables donors to provide income for themselves, a spouse, or others while making a generous gift to the Foundation. These are separately managed trusts of various types that can be designed to meet specific financial needs and investment objectives.

Retirement Plan Assets: Your retirement assets, such as 401(k) plans and IRAs, are among the most heavily taxed. In fact, at your death, your estate not only owes estate taxes, but income taxes for the tax deferred savings you were enjoying (potentially reducing your retirement plan value by up to 75%). Establishing The Foundation as beneficiary to your retirement plan assets enables you to reduce estate taxes and avoid income tax altogether.

We all strive to leave the world a better place – through our children, our good deeds, our generosity.

With a legacy gift, your impact can continue beyond your lifetime. In a hundred years, you can still be changing lives.

This could be the most important gift you ever make.



**FJMC LEGACY SOCIETY-
DECLARATION OF INTENT**



In the Jewish tradition of sharing our blessings, I/we take deep satisfaction in declaring my/our intent to insure Jewish continuity by helping the FJMC provide for the needs of future generations,

- I/We have made provisions, or
- I/We will make provisions to include FJMC as beneficiary in:
 - a bequest in my/our will
 - a deferred lifetime gift
 - a life insurance gift
 - a trust fund or foundation
 - a remainder of IRA/other retirement plan

Amount of Bequest: The approximate value of the bequest will be \$ _____ or

- over \$500,000 \$100,000 to \$249,999 \$25,000 to \$49,999
- \$250,000 to \$499,999 \$50,000 to \$99,999 Under \$25,000 not sure

Charitable Use:

- No restriction on use by organization
- Bequest restricted for the following purpose _____

I wish to become a Fellow of the FOUNDATION FOR JEWISH LIFE _____

Call to discuss any above items with Foundation Chair **Doug Segerman, 614-893-2694 (mobile)**
Name(s) will be used for recognition purposes unless otherwise indicated.

Name: _____ Best phone # _____

e-mail _____

Address: _____ City, State, Zip: _____

Signature: _____ Date: _____

Please mail to: **Treasurer, FJMC Foundation for Jewish Life**
c/o Ken Turkewitz, 12 Carl Road, Walpole, MA 02081-1106