

WILLS AND LIVING TRUSTS

When you make a gift in your will or living trust, you create a legacy that helps ensure the future vitality of the Jewish community.



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Naming the Jewish Community Foundation of Greater MetroWest NJ (JCF) as a beneficiary of your will or living trust is a convenient way to continue your tradition of lifetime giving. Your gift can make a meaningful impact on the Jewish future.

How does it work?

You may decide to leave a gift in your will or living trust of a specific dollar amount, a percentage of your estate, or all or part of what remains after you provide for family and friends.

What are the benefits?

- A gift in your will or living trust does not affect your cash flow.
- Your assets remain in your control during your lifetime.
- You can modify or revoke your gift at any time if circumstances change.
- You can direct your gift to fields of interest you feel passionate about.

Sample Language

Here are two samples of gift language you may wish to share with your lawyer:

I give [\$____][specified property][__%] of the residue of my estate] to the Jewish Community Foundation of Greater Metrowest NJ [for its continuing charitable purposes][to support the continuing charitable purposes of <Name of Agency>][to support <Description of Cause>].

I give [\$____][specified property][__%] of the residue of my estate] to the Jewish Community Foundation of Greater Metrowest NJ to establish a fund to be known as the “_____ Fund,” subject to the Federation’s rules governing the operation of endowment funds as they may be amended from time to time, the annual distributions from which shall be used to support (choose one or more):

- The Foundation’s unrestricted endowment fund
- The Foundation’s Annual Campaign
- <Specific field of interest>
- <Agency Name(s)> of the Foundation

These examples are intended only as suggestions. Foundation advisors would be happy to work with your financial and legal advisors to create language that reflects your objectives.

This material is presented for informational purposes only and should not be construed as legal, tax or financial advice. When considering gift planning strategies, you should always consult with your own legal and tax advisors.



Kim Hirsh
Executive Director
(973) 929-3026
khirsch@jfedgmw.org
901 Route 10 | Whippany, NJ 07981
Jcfigmw.org