



Charitable Bequests

What is a Charitable Bequest?

- Fully deductible from estate taxes
- Contributions from pension plan- avoids taxes
- Everlasting gift to the Jewish Community

Purpose of Gift

- Gifts may be unrestricted for use by the entire organization or for a specific area
 - Gifts may be restricted*

**Please discuss any specific restrictions with Foundation staff so we can assure the best possible use of your gift.*

Sample Bequest Wording

I give and devise to the Foundation - Jewish Communities of Western CT, Inc., located in Southbury, CT, my entire residual estate (or ____% of my residual estate, or \$_____, or a specific item) to create the "Donor _____ Philanthropic Fund". Income from the fund shall be used to support the mission of the Foundation.

It is helpful for the Foundation to have in its confidential files a copy of the excerpts from your estate documents that pertains to your charitable gift provision.

How would you like your gift to be used?

Gift Recognition

- I wish to have my gift of bequest to the Foundation remain anonymous
- I wish to have my bequest recognized in any marketing materials the Foundation deems appropriate under the following names: _____ (please print)

Signature _____ Date _____

Please return to:

The Foundation - Jewish Communities of Western CT, Inc.
444 Main Street North
Southbury, CT 06488