



: CREATE A  
 : JEWISH LEGACY  
 : Planned Giving

Let the Jewish Community Foundation help you explore opportunities to create a Jewish legacy through a planned gift.

A planned gift ensures that your values and those of the charitable causes you care about will continue into the future.

For more information about creating a Jewish legacy, contact Josh Stein at 913-327-8121 or [jstein@jcfkc.org](mailto:jstein@jcfkc.org).



**JEWISH  
 COMMUNITY  
 FOUNDATION**  
 OF GREATER KANSAS CITY



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*Smarter Giving. Your Way.*

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# Create a Jewish Legacy



## Planned Giving Vehicles

### What is a planned gift?

Planned gifts are structured to provide you with the greatest strategic impact and tax benefits. Often designed to take effect in the future through your estate, planned gifts can be simple to establish and are often used to create endowments which provide long-term financial resources for the charities you care about most.

### How can JCF help me establish a planned gift?

There are a wide array of methods to establish a planned gift and we are here to help you every step of the way. We've helped hundreds of donors create a Jewish legacy by making commitments to the charities of their choice.

**OUTRIGHT GIFTS** - You can make a gift of cash, marketable securities, real estate or other assets today to support your favorite charities now and into the future.

**CHARITABLE BEQUESTS** - Through a bequest in your will or trust, you can support the organizations that have been meaningful to you, while still being able to retain your assets during your lifetime.

**LIFE INSURANCE POLICIES** - You can name a charity the owner and/or beneficiary of a new or existing life insurance policy and potentially benefit from significant tax advantages during your lifetime. Upon your death, a substantial gift will be made to support your favorite charity's good works.

### QUALIFIED RETIREMENT PLANS

- If you name your non-spouse heirs as beneficiaries of your retirement plan at death, they could incur substantial tax liabilities. However, if you name your favorite charities as a beneficiary of your plan, taxes will be avoided and the full amount of your gift will be used to fulfill your philanthropic wishes.

### GIFTS THAT GENERATE INCOME

- Through a Charitable Gift Annuity or Charitable Remainder Trust, you can make a gift that will pay you or someone else income for life or for a term of years. Upon the death of the income recipient, the balance will be used for the benefit of your favorite charities.