

Since the Federation's founding in 1910, our renowned personal service and philanthropic expertise have established our position as the Bay Area's Center for Jewish Philanthropy. The Federation team invites professional advisors to contact us to answer any questions about legacy gifts.

To assist you and your clients, we have provided sample language for the most common gifts to Federation by will or trust, and information required for gifts by beneficiary designation in a retirement account, life insurance policy or POD account.

SAMPLE WILL OR TRUST LANGUAGE

Unrestricted General Purpose Gift

"I give to Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties; 121 Steuart St., San Francisco, CA 94105; Federal Tax ID # 94-1156533 ("Federation") [____ % of the residue of my estate / the sum of \$ ____] for the Federation's general purposes."

Unrestricted Endowment Gift

A legacy gift of any amount to the Federation's Unrestricted Endowment gives the Federation the flexibility and resources to address the Jewish community's most pressing needs, whatever they may be in the future.

"I give to Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties; 121 Steuart St., San Francisco, CA 94105; Federal Tax ID # 94-1156533 ("Federation") [____% of the residue of my estate / the sum of \$ ____] for the Federation's Unrestricted Endowment."

Donor-Designated Endowment Gift

Donors can establish or add to an endowment to provide permanent annual support for one or more beneficiaries. Examples include:

- A specific JCC, synagogue, school, Jewish summer camp, or another agency
- The Federation's Annual Campaign
- An impact area, for example:
 - o Strengthening Jewish Life and Identity
 - o Combating Antisemitism
 - o Caring for People in Need
 - o Promoting Justice and Inclusion
 - o Responding to Crisis

"I give to Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties; 121 Steuart St., San Francisco, CA 94105; Federal Tax ID # 94-1156533 [____% of the residue of my estate / the sum of \$ ____] to be added to the Endowment Fund, [for the benefit of/to provide funding to] _____ ."

Confirming beneficiaries: Before formalizing a gift of this type, especially for a program or an area of interest, always contact the Federation to ensure that your client's wishes can be fulfilled in the future.

Multiple beneficiaries: With a special gift agreement with the Federation, donor-designated endowment funds can include multiple beneficiaries, which can later be changed as many times as needed without modifying one's estate plan. Please contact the Federation for more information and sample language for this option.

Minimums: The minimum to establish a separate named endowment fund is \$100,000. Gifts of a percentage of the estate anticipated to exceed \$100,000 are acceptable and encouraged. Any discussions will be kept confidential.

Donor-Advised Fund

Legacy gifts to establish donor-advised funds (DAFs) can provide a donor's children with charitable resources to develop and enact their own philanthropy.

"I give to Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties; 121 Steuart St., San Francisco, CA 94105; Federal Tax ID # 94-1156533 ("Federation") [___% of the residue of my estate / the sum of \$ _____] to establish the _____ Fund, a donor-advised fund of the Federation advised by my child _____."

GIFTS BY BENEFICIARY DESIGNATION (Retirement Accounts, Life Insurance, POD Designations)

When arranging for your client's legacy gift by beneficiary designation, first contact the Federation so a gift agreement establishing the purpose of the gift can be completed. Legacy gifts by beneficiary designation are considered unrestricted unless instructions are given in writing.

Next, formalize the gift using the following:

Legal name: Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties

Address: 121 Steuart St., San Francisco, CA 94105

Phone: (415) 777-0411

Tax ID: 94-1156533

Donor Recognition

Donors who formalize gifts adding to or establishing permanent endowment funds at the Federation benefiting the Jewish community are recognized as members of the Federation's Centennial Living Legacy Society. Please contact us for more information.

Questions?

Contact: Steve Brown
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Please note that this content is informational only and does not constitute legal or tax advice.