Creating a Legacy for the Organization/Synagogue
Frequently Asked Questions

And as my parents planted for me before I was born,
so do I plant for those who come after me.
--Talmud

Why and when should I start to think about leaving a legacy to your organization?
Jewish tradition teaches that one of our key duties is to make the world a better place for future generations. The time is always right to think about how you wish to be remembered through your generosity of a legacy gift.

How can my legacy to your organization reflect what is important to me?
Your legacy gift can be a meaningful, life-changing experience. Picture your organization decades from now. What do you see? Why have you already contributed your time and money to your organization? Through your legacy, you can ensure that this [organization/synagogue] you love will thrive in perpetuity and that the issues you are most concerned with will continue to be addressed.

What about my children?
Engage your children in the legacy conversation. Here are some suggestions:
- Hold a family discussion about how your values have been expressed through giving to this [organization/synagogue].
- Share with your children the reasons why you want to leave a gift to this [organization/synagogue] after your lifetime.
- You are encouraged to sign the Book of Life and to have your children attend this special occasion.

How can my legacy inspire others?
The legacy planning process can be a wondrous journey. It can engender heartfelt conversations with your family and your [organization/synagogue] community. It is truly a way to let your name be remembered as a blessing.

Your promise to provide for the Jewish community after your lifetime also makes you eligible to sign the Book of Life, a treasured archive. By inscribing your name and including a personal message, you express your belief in and commitment to Jewish values and heritage—ensuring that our people will survive and flourish. The Book of Life is displayed prominently at
the Jewish Community Foundation, an ever-growing record of names and legacies—a true portrait of our community.

Do I have to be wealthy in order to leave a legacy?
No...A legacy gift of any size will help to ensure our future.

Can I leave a legacy to more than one organization?
Yes...It will help to strengthen the entire Jewish community.

When Your Organization/Synagogue Receives the Following Questions
Involve the Jewish Community Foundation

How should I structure my legacy?
Depending on your goals, your legacy can be structured in the way that is most advantageous for you. You, your spouse and family members can receive income for life through charitable gift annuities or charitable remainder trusts. Or your legacy can be a simple bequest in your will or trust.

When should I fund my legacy?
Depending on your assets and goals, you can fund your legacy now or after your lifetime. For example, if you feel there is a compelling need to provide scholarships for your [organization/synagogue] for needy children, you can begin those scholarships now and direct your estate to complete the balance of the funding. Alternatively, you can designate your entire legacy to be funded after your lifetime if that is more appropriate for you.

The Foundation is here to be your key philanthropic resource, advisor and guide. We are happy to have a confidential meeting with your potential legacy donors with or without you, depending on their preference. We can work with their professional advisors to plan their gifts in a way that furthers their unique financial and charitable goals. We are available to meet and consult with their professional advisors throughout the process.

Members of the Foundation staff frequently meet with individuals interested in formulating their estate plans/legacy plans. We play a vital role in this process and are confident that your donors would appreciate the opportunity to receive our counsel on these sensitive issues. JCF can add value to your relationships with your donors.

Please contact Gail Littman at (858) 279-2740 or gail@jcfsandiego.org

Please remind your donors to consult with their financial and legal advisors in order to determine the best options for their individual situations.

Create a Jewish Legacy

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