



ENDOWMENT OVERVIEW



ENDOWMENT AND PLANNED GIVING

By making a planned gift to a Jewish Federation Foundation (JFF) Endowment, you ensure that your generosity and vision will have an impact extending far beyond your lifetime. We have a proud history as a trusted custodian of our community's philanthropic capital. In partnership with the Rhode Island Foundation, JFF oversees more than \$80 million in assets. Today, endowment funds that were established decades ago are providing important support to our community. We have the knowledge and expertise to work with you and your family to create a planned gift that will perpetuate your legacy.

DOR L'DOR PLANNED GIVING AND BEQUEST SOCIETY

Your planned gift makes you eligible for membership in the *Dor L'Dor* Society, our planned giving and bequest society. Special events are held for *Dor L'Dor* members, honoring their commitment to sustaining the Jewish community. Your name will appear along with other *Dor L'Dor* members in our annual Donor Report as a way to honor your foresight and inspire others to follow.

Bequests:

You may consider leaving either a dollar amount, percentage of your residuary estate, or a specific asset to the JFF in your will or living trust. No minimum dollar amount is required. Documentation is highly recommended to ensure that your intentions can be honored by the JFF.

Sample bequest language:

"I give and bequeath to the Jewish Federation Foundation, Providence, Rhode Island [the sum of \$____] or [____ percent of my residuary estate] or [the following property] to be used to support the _____ (state purpose if there are additional purposes). If, in the opinion of the JFF Board, all or part of this bequest cannot be usefully applied to this purpose due to changed circumstances, they may use the bequest for any purpose that in their opinion will most nearly accomplish my wishes and purposes."

Note: The language given here is only suggested language and is meant to be used with the advice of your attorney.

Special Opportunities:

Perpetual Annual Campaign Endowment (PACE): You can create an endowment to perpetuate your Annual Campaign gift to the Jewish Alliance of Greater Rhode Island. This is a wonderful way to sustain your lifelong investment in the Jewish community.

Lion of Judah Endowment (LOJE): By establishing a Lion of Judah Endowment with a minimum gift of \$100,000, you can permanently endow a woman's Annual Campaign gift of \$5,000 or more to the Jewish Alliance of Greater Rhode Island.

Outright Gift of Real Estate: You can contribute your home or other real property to the JFF and get a tax deduction based on the appraised value.

Donor Advised Funds: A donor advised fund (DAF) is a charitable giving fund. You can think of it as a philanthropic bank account. After completing a simple enrollment application, you make a gift of cash or other assets in the amount of \$2,500 or more. You can add to your fund at any time. Once your fund is invested with JFF's Endowment, you may begin recommending grants to the Jewish Alliance of Greater Rhode Island, other Jewish or secular nonprofit organizations, or even to fulfill synagogue dues.

Restricted Assets:

Life Insurance: Designate JFF as a beneficiary of your life insurance policy. No minimum amount required.

Retirement Funds: Designate the JFF as an unconditional beneficiary of your retirement plan (e.g., 401(k), IRA). This is perhaps the easiest way to join the *Dor L'Dor* Society – and it's revocable. No minimum amount required.

For more information, contact Jennifer Zwirn, Chief Development Office:
jzwirn@jewishallianceri.org or 401.421.4111 ext. 102

The Jewish Federation Foundation supports the Jewish Alliance of Greater Rhode Island's mission of caring for those in need, strengthening Jewish life and advancing the unity, values and shared purpose of the Jewish people. Through the acquisition, professional management and distribution of capital resources, the JFF ensures that the programs, services, and institutions that serve our people in Rhode Island, in Israel, and abroad will be enhanced and sustained for the ages.

