



Chevra Legacy Circle

Understanding Legacy Giving Options

There are many different ways to leave a legacy. A bequest is simple and convenient. In thinking about a bequest you will want to consider the amount (as a specific dollar amount or as a percentage); the use of your bequest; and the potential to honor or memorialize someone important to you.

Everyone has a unique family and financial situation. Your legacy gift of any size can be designed to match your personal circumstances. These options include:

- **Charitable Bequest in Your Will or Trust.** You can create a permanent legacy by leaving a bequest of a specific amount of cash, a percentage of your estate, or the remainder of your estate.
- **IRA, 401K, 403B or Pension Plan.** Naming one or more Jewish organizations as the after death beneficiaries of some portion of your IRA or other pension fund can save on income and estate taxes while supporting the organization closest to your heart.
- **Life insurance policy.** Life insurance policy is an advantageous and inexpensive way to create a legacy. You can purchase a new policy naming a charity as owner and beneficiary, transfer an existing policy and name the charity as owner, or just name the charity as one of the beneficiaries of an existing life insurance policy.

Congregation Chevra Thilim

751 – 25th Avenue, San Francisco, CA 94121 415.752.2866 www.sfshul.org



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Sample wording for including Congregation Chevra Thilim in your will or trust.

Below are two examples of suggested bequest wording to benefit Congregation Chevra Thilim. We encourage you to share your final will provision with Chevra to ensure that your wishes will be properly followed and recognized.

Percentage of your estate

I give, devise, and bequeath to Congregation Chevra Thilim, a not-for-profit organization located in San Francisco, CA _____ percent (%) of the rest, residue, and remainder of my estate as an unrestricted gift to be used at the discretion of the Board of Directors of Congregation Chevra Thilim for the general purposes of Congregation Chevra Thilim

Specific amount

I give, devise, and bequeath to Congregation Chevra Thilim, a not-for-profit organization located in San Francisco, CA \$_____ in cash or in-kind or _____ shares of _____ stock to be used at the discretion of the Board of Directors of Congregation Chevra Thilim for the general purposes of Congregation Chevra Thilim.

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