

Sample Bequest Language

Support the Jewish Federation of Greater Atlanta



You can name the Jewish Federation of Greater Atlanta (JFGA) as a beneficiary in your will or trust. You may also add a codicil to your will and/or make an amendment to an existing trust. The amount can be specified in dollars or as a percentage of your estate.

Benefits:

- Does not affect your current income or assets during your lifetime
- Easy to create and modify with the assistance of an attorney if your circumstances change
- Effective planning tool to reduce estate taxes, if applicable
- Create a lasting legacy to be remembered

Bequest Language

To make a gift in your will or trust (bequest), you should speak with your attorney, who can help you include a bequest to JFGA in your estate plan. Through a minimum legacy commitment of \$25,000, you may establish an endowment. Here is some sample language to share with your attorney:

Bequest of a specific dollar amount:

I hereby give, devise and bequeath _____ and No/100 dollars (\$DOLLARS) to the Jewish Federation of Greater Atlanta, a nonprofit organization located at 6120 Powers Ferry Road, Atlanta, GA 30339, Federal Tax ID EIN: 58-1021791, for the establishment of the XXX Endowment Fund at the Jewish Federation of Greater Atlanta's to support XXX.

I hereby give, devise and bequeath _____ and No/100 dollars (\$DOLLARS) to the Jewish Federation of Greater Atlanta, a nonprofit organization located at 6120 Powers Ferry Road, Atlanta, GA 30339, Federal Tax ID EIN: 58-1021791, for the Jewish Federation of Greater Atlanta's general use and purpose.

Bequest of a percentage of your estate:

I hereby give, devise and bequeath ____ percent (___%) of my total estate, determined as of the date of my death, to the Jewish Federation of Greater Atlanta, a nonprofit organization located at 6120 Powers Ferry Road, Atlanta, GA 30339, Federal Tax ID EIN: 58-1021791, for the Jewish Federation of Greater Atlanta's general use and purpose.

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Restricted Bequest to Perpetuate Your Annual Campaign Gift

Perpetual Annual Campaign Endowment (PACE):

The PACE program honors those donors who have chosen to perpetuate their annual gift. By sustaining your gift after your lifetime, your PACE gift helps to provide the Federation with the resources to care for those in need, meet unexpected challenges and plan for the future, now and forever.

Through a minimum legacy commitment of \$25,000, a donation of at least \$1,500 will be made every year, in your name to the Jewish Federation of Greater Atlanta's Annual Campaign, thus creating a lasting Jewish legacy. The funds will provide a solid base of ongoing support for the Atlanta Jewish community forever.

Sample language to share with your attorney:

I/We give, devise and bequeath the sum of \$___ to the Jewish Federation of Greater Atlanta, a nonprofit organization located at 6120 Powers Ferry Road, Atlanta, GA 30339, Federal Tax ID EIN: 58-1021791, to permanently endow a commitment to its Annual Campaign in my/our name, which shall be appropriately recognized as a Perpetual Annual Campaign Endowment.

Lion of Judah Endowment (LOJE):

The Lion of Judah is now an international symbol of commitment to the global Jewish community. Similar to a PACE, The LOJE program honors women who have perpetuated their Lion of Judah-level donation.

Through a minimum legacy commitment of \$108,000, a donation of at least \$5,400 will be made every year, in your name to the Jewish Federation of Greater Atlanta's Annual Campaign, thus creating a lasting Jewish legacy. The funds will provide a solid base of ongoing support for the Atlanta Jewish community forever.

Sample language to share with your attorney:

I give, devise and bequeath the sum of \$___ to the Jewish Federation of Greater Atlanta, a nonprofit organization located at 6120 Powers Ferry Road, Atlanta, GA 30339, Federal Tax ID EIN: 58-1021791, to permanently endow a commitment in my, which shall be appropriately recognized as a Lion of Judah Endowment.