



A lasting legacy that will continue to support the Annual Campaign.

For details concerning the Beckerman Family match, visit us online at newhavenjewishfoundation.org/news

or contact

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All inquiries are confidential.

This material is presented for informational purposes only and should not be construed as legal, tax, or financial advice. When considering gift-planning strategies, you should always consult with your own legal and tax advisors.



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Beckerman Family PACE Challenge



What Will Your Legacy Be?

Create a Legacy for the
**Jewish Federation of
Greater New Haven**

**Lion of Judah
Endowment (LOJE)**



Thanks to the generosity of David and Ruthann Beckerman, there is currently a \$2 million match for all PACE and LOJE gifts.*

Provide a legacy for your children and grandchildren. Protect what's most important to you. Safeguard your values—forever.

A PACE fund (Perpetual Annual Campaign Endowment) is a designated/restricted fund which endows a donor's Federation annual campaign gift. A LOJE fund (Lion of Judah Endowment) is a type of PACE fund which provides a permanent endowment to perpetuate a woman's annual Lion of Judah campaign gift.

What Is a LOJE Fund?

- A Lion of Judah Endowment (LOJE) fund is a permanent endowment fund of the Jewish Federation of Greater New Haven established in your name to perpetuate your annual Lion of Judah commitment to the Federation's Annual Campaign. A woman who gives a minimum commitment of \$100,000 will establish a named fund through this unique program.
- The annual spendable portion of the Lion of Judah Endowment Fund is used each year to make a grant to the Federation's Annual Campaign. The grant will be made into perpetuity in your name and guarantee future support of critical programs and services.

The strength and vitality of women's giving continues through LOJE—enabling women to help create social justice, heal the sick, preserve human dignity, and provide Jewish education and growth for all.

By Creating a LOJE Fund You...

- Provide a permanent source of funding for the Federation's Annual Campaign, helping to ensure that the vital operating needs of the community are met in the future.
- Invest in the future of the Jewish community and serve as a role model for future generations.

How Does It Work?

- You create a Lion of Judah Endowment (LOJE) fund with a minimum commitment of \$100,000
- You can make a gift of cash, securities, or other property through your estate plan to create a LOJE Fund either during your lifetime or after your death.
- You can also use life insurance, charitable remainder trusts, retirement accounts and donor advised fund recommendations to create a LOJE Fund.

There are several ways to fund your LOJE:

- **Gift of Cash/Assets** – An outright gift of cash or appreciated assets like stocks, bonds, or property is the easiest way.
- **Bequest** – A simple bequest in a will is the most common technique for creating a LOJE.
- **Gift of Life Insurance** – A gift of a life insurance policy is particularly appealing for younger donors because of its reasonable cost and tax benefit. By naming the Jewish Foundation of Greater New Haven owner and beneficiary, the donor may be able to deduct the premiums.
- **IRA Charitable Rollover** – If you are 70 ½ or older, you can distribute monies from your IRA, tax-free, to fund your LOJE.
- **IRA/401K/403B Designation** – Retirement plans are subject to income taxes when left to non-spousal heirs who must withdraw all of the monies within 10 years. When left to the Jewish Foundation, there are no income tax consequences.
- **Charitable Annuities/Lead Trusts/Remainder Trusts** – Any of these vehicles can be dedicated to create a LOJE with tax-savings to the donor.

From Generation to Generation...

Your LOJE gift will continue to impart your values. Paying them forward today and for generations to come. Instill the importance of upholding our Jewish community. Help others. Work to repair the world. It is the most precious legacy you can leave. *L'dor v'dor.*

Be forever remembered by our community for the legacy you leave.