



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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A light for one is a
light for a hundred.

Talmud

Beckerman Family PACE Challenge

What Will Your Legacy Be?

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

**Perpetual Annual Campaign
Endowment (PACE)**

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

Extend your Annual Campaign commitment. Inspire the next generation—and generations to come. Make a connection to the future.

Perpetual Annual Campaign Endowment (PACE)

With a Perpetual Annual Campaign Endowment (PACE), you can endow your gift to the Jewish Federation of Greater New Haven and guarantee future support for critical programs and services in the Jewish and general communities. With a PACE fund, your annual gift will be there forever to carry on your acts of *tzedakah* and charity.

What Is a PACE Fund?

A Perpetual Annual Campaign Endowment (PACE) Fund is a permanent endowment fund of the Jewish Federation of Greater New Haven established in your name to perpetuate your commitment to Federation's Annual Campaign. The annual spendable portion of fund is used each year to make a grant to Federation's Annual Campaign. The grant will be made in your name in perpetuity.

How Does It Work?

All of us, regardless of age, wealth, or affiliation, have the ability to leave a legacy. Your legacy gift of any size can be customized and structured to fit your dreams, lifestyle, family, and financial needs. You can provide support for a particular organization or area of interest.

- You establish a PACE fund with a minimum commitment of \$10,000*
- You can make a gift of cash, securities, or other property through your estate plan to create a PACE 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 PACE Fund.

*Commitments under \$10,000 are pooled together in the Jewish Foundation of Greater New Haven's Community PACE Fund.

Why Are PACE Funds Important?

PACE funds allow our community, through permanent endowment funds dedicated to the Jewish Federation's Annual Campaign, to ensure that we have funds to continue to provide programs and services to our Jewish community here in Greater New Haven, Israel, and overseas for present and future generations.

What Are The Benefits?

- When you make the gift during your lifetime, you may receive a charitable income tax deduction.
- If you use your estate plan, and a gift is made upon your death, your estate can receive a charitable income tax deduction.
- 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.
- You invest in the future of the Jewish community and serve as a role model for future generations.

There are several ways to fund your PACE:

- **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 PACE.
- **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 Federation of Greater New Haven owner and beneficiary, the donor may be able to deduct the premiums.
- **Gift of IRA or Pension Plans** - IRA and pension plans are subject to high taxes when left in your estate. That makes them ideal for transfer in whole or in part to Federation to create a PACE.
- **Charitable Income Plan** - A Charitable Remainder Trust or Charitable Gift Annuity offers life income payments with the benefit of a current tax deduction. The remainder of the trust or annuity can be dedicated to create a PACE

Of course, there are additional funding vehicles available to you. The Jewish Foundation staff or your financial or estate planner can help you select the ones best suited for your needs. All contributions to establish a PACE are tax deductible. In addition, contributing appreciated assets held at least one year avoids the tax on capital gains.

A gift today to the Jewish Community will allow you to be there for your family, your community, and the Jewish people—whenever help is needed in the future.

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

