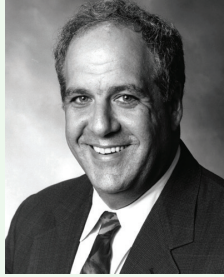


Through a Bequest to JNF, Your Name Will Live On in Israel

By Matt Bernstein, CFP, JNF Chief Planned Giving Officer



Over the years this column has dealt with some sophisticated and helpful planned giving strategies that offer our donors myriad benefits. From enhancing income through our gift annuity program to demonstrating the many benefits derived from donations of highly appreciated assets such as real estate, we have shown Jewish National Fund donors they can plan for their future while ensuring the work of JNF will continue. We call it a “win-win” scenario.

One of the simplest ways to plan is to leave JNF as a legatee in your estate. In this case all you need to do is mention in your will that you would like to leave a sum of money to Jewish National Fund. What better way to commemorate a lifetime of good memories and successes or perpetuate the memory of a loved one, as well as secure your wishes for the future, than with a bequest in your will to Jewish National Fund? Through your bequest, your name and generosity live on via JNF’s critical projects in Israel, enabling the land to grow and fulfill its destiny on behalf of Jewish people everywhere. At the same time, your bequest may protect your assets from taxes and other expenses.

After providing for your loved ones, there are numerous ways to help one of JNF’s visionary programs continue in your memory: Forestry and Green Innovations; Water Renewal; Community Building; Zionist Education; Research & Development; Heritage Sites; and Accessibility & Therapeutic Services.

There are several ways to leave a bequest and JNF’s planned giving specialists can assist you in the method that suits you best. In brief you can leave a:

- Bequest of a sum - A precise dollar amount.
- Specific bequest - Designate a specific asset to be used.
- Residuary bequest - After all debts, taxes, and other bequests have been paid, designate the remainder of your property to be given to JNF.
- Restricted Bequest - Tell us how exactly you would like the gift to be used: fund existing projects or create a new one.

A JNF Planned Giving specialist can work with you and your advisors to provide specific language that can be custom tailored to ensure your wishes are carried out exactly as you desire.

Here is a helpful planning tip: IRAs, 401ks and other similar retirement plans are among the heaviest taxed assets of your estate. By choosing these as bequests you can save taxes, increase the amount left to your heirs, and transfer the larger tax liabilities to JNF.

If you would like more information call the JNF Planned Giving Department at **800.562.7526** or email us at plannedgiving@jnf.org. Also, visit our new Planned Giving web site at www.jnlegacy.org, which offers helpful information, including a “Wills Planning Guide” that can be very useful as you plan your estate.

We look forward to hearing from you. ■