

LEGACY GIVING OPTIONS

Your Goal	Your Gift	How to Make the Gift	Your Benefits
Establish a future gift while maintaining lifetime control of your assets	Bequest	Name Jewish Home & Senior Living Foundation (JH&SLF) in your will or living trust	<ul style="list-style-type: none"> * Donation exempt from federal estate tax * Control of assets during your lifetime
Supplement income with fixed payments that may be partially tax-free	Charitable Gift Annuity	Establish a simple annuity contract naming JH&SLF as the beneficiary	<ul style="list-style-type: none"> * Fixed life payments for one or two individuals * Immediate tax income tax charitable deduction * Current and future savings on income taxes
Secure income for you or a loved one with potential for income growth	Charitable Remained Trust	Establish and fund a trust naming JH&SLF as the beneficiary	<ul style="list-style-type: none"> * Fixed or variable income for life or a term of years * Immediate income tax charitable deduction * Ability to use a variety of assest to fund trust
Identify a simple, tax-effective way to make a future gift	Retirement Plan Assets	Name JH&SLF as a beneficiary of your retirement plan	<ul style="list-style-type: none"> * Avoidance of double taxation on your estate * Simple and inexpensive to establish
Transfer real property ownership and convert it into a gift	Real Estate	Donate a portion or all of the property to JH&SLF	<ul style="list-style-type: none"> * Income and capital gain tax savings * Relief from management of unused property * Ability to retain and/or convert into trust income
Leverage an insurance policy that is no longer needed	Life Insurance	Name JH&SLF as owner and/or beneficiary of a policy	<ul style="list-style-type: none"> * Eligibility for an income tax deduction based on the value of the paid up policy * Simple, inexpensive way to make a gift
Ensure your current recommendations are known in the future	Named Endowment Fund	Establish and fund a named endowment with JH&SLF, now or upon death	<ul style="list-style-type: none"> * Simple way to a future donation * Control over the future allocations of your funds

As with other important financial decisions, you may want to consult legal and financial professionals for advice.