

# ADVISOR'S GUIDE FOR PLANNED GIVING

## GIFTS FROM WILLS AND TRUSTS:

A gift to Providence in your will or revocable trust enables you to make a gift that lasts beyond your years. Use the language below to include Providence in your plans.

**Residual Gift Language** — A residual bequest comes to Jewish Foundation of Greater New Haven after your estate expenses and specific bequests are paid.

I give and devise to Jewish Foundation of Greater New Haven (Tax ID #45-2403156), located in Woodbridge, CT 06525, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

**Specific Gift Language** — Naming Jewish Foundation of Greater New Haven as a beneficiary of a specific amount from your estate is easy.

I give and devise to Jewish Foundation of Greater New Haven (Tax ID #45-2403156), located in Woodbridge, CT 06525, the sum of \$ \_\_\_\_\_ (or asset) to be used for its general support (or for the support of a specific fund or program).

**Contingent Gift Language** — Jewish Foundation of Greater New Haven or its affiliates can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

If (insert name) is not living at the time of my demise, I give and devise to Jewish Foundation of Greater New Haven (Tax ID #45-2403156), located in Woodbridge, CT 06525, the sum of \$ \_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).

## GIFTS OF APPRECIATED SECURITIES:

Please contact the Jewish Foundation of Greater New Haven for a stock transfer form.

## BENEFICIARY GIFTS FROM RETIREMENT PLANS, LIFE INSURANCE, BROKERAGE ACCOUNTS OR ALL OTHER PLAN WITH A BENEFICIARY DESIGNATION:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to the Jewish Foundation of Greater New Haven.

**Legal name:** the Jewish Foundation of Greater New Haven

**Federal Tax ID Number:** 45-2403156

**Incorporated in:** Woodbridge, CT

## NOTE TO ATTORNEYS, ACCOUNTANTS AND OTHER PROFESSIONAL ADVISORS:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please call the Jewish Foundation of Greater New Haven, at 203-387-2424.