

3 STEPS TO MAKING A BENEFICIARY GIFT

Did you know that the beneficiary designation on a retirement plan or life insurance policy determines who will receive these funds, even if they are designated differently in your will? Did you also know that funds remaining in your IRA may be subject to multiple taxes if left to your heirs?

If you are considering including a gift to the Jewish Foundation of Greater New Haven we have a simple solution.

Name the Jewish Foundation of Greater New Haven as a beneficiary or partial beneficiary of your retirement plan and leave other less-taxed assets to your family.

All gifts can be designated for the organization or need most important to you

IT'S EASY AS 1, 2, 3!

- 1** Request a "change of beneficiary" form from your plan administrator.
- 2** List the Jewish Foundation of Greater New Haven as beneficiary at the following address:
360 Amity Road
Woodbridge, CT 06525
- 3** Inform us of your intentions so we can thank you!