



## Bequests

A bequest is a legal provision made by will or living trust through which you can name the Capital Jewish Museum as the recipient of the whole or part of your estate. A bequest can be in the form of a testamentary trust or a specific dollar value, percentage, or piece of property. Bequests to the Museum reduce federal, and in most cases, state taxes on an estate.

### Sample Bequest Language

"I give to the Capital Jewish Museum, a non-profit 501(c) (3) organization, located in Washington, DC, the sum of \$\_\_\_ or \_\_\_% of my estate, . . .

- Unrestricted: . . . for general purpose."
- Specific Purpose: . . . for [stated purpose]."
- Endowed Fund\*: . . . to be used as a permanent endowment, the income only from which shall be used for [stated purpose]."

\* Unrestricted Named General Endowment Funds can be created with a gift of \$50,000.

\* Restricted Named Endowed Funds can be established with a gift of \$250,000.

### Residuary Bequest

Leaves any remainder to the Museum after all other bequests have been paid.

"All the rest, residue, and remainder of my estate, both real and personal, I give to the Capital Jewish Museum, a non-profit 501(c) (3) organization, located in Washington, DC, to be used for [stated purpose]."

## Gifts of IRA or Retirement Plan Assets

Name the Museum as a beneficiary on a Designation of Beneficiary Form.

### IRA Rollover/Charitable Gift Distribution

If you are 70 1/2 years of age or older, you may transfer up to \$100,000 – exempt from taxes – from your IRA to the Museum.

### Create a Jewish Legacy: Endowments

*Jewish Community Foundation of the Jewish Federation of Greater Washington*

Enables donors to establish endowments through the Jewish Community Foundation to benefit the Museum.

### Create a Jewish Legacy: Charitable Gift Annuities (CGA)

In exchange for your gift of transferred assets naming the Museum as the beneficiary, you will receive a fixed income for life, beginning at a minimum age of 55. Coordinated with Jewish Community Foundation.

### Life Insurance

Name the Museum as the beneficiary of an existing life insurance policy.

## 1876 Legacy Society Planned Giving Statement of Intent

Date: \_\_\_\_\_ Names: \_\_\_\_\_

Phone:  Home  Cell \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

- Yes, please call me to discuss planned giving opportunities.
- Yes, I/we have made a provision for the Lillian and Albert Small Capital Jewish Museum in my/our estate plans.
- The provision is a bequest in my will.
- I'd like to discuss a named endowment.
- I have named the Lillian and Albert Small Capital Jewish Museum beneficiary of:
  - My IRA or other qualified retirement plan
  - A bank or brokerage account
  - A life insurance policy
  - Other (Please describe)

- I'd like to discuss establishing a charitable gift annuity to support the Lillian and Albert Small Capital Jewish Museum via the Jewish Community Foundation
- Please feel free to list my name in the Museum's publications as a member of the 1876 Legacy Society
- I prefer to remain anonymous

Thank you for ensuring our future by including the Lillian and Albert Small Capital Jewish Museum in your estate plans.

Please return this completed form to **Malki Karkowsky, Chief Advancement Officer, 575 3rd St., NW Washington, DC 20001**. For more information, email her at [mkarkowsky@capitaljewishmuseum.org](mailto:mkarkowsky@capitaljewishmuseum.org) or call 301-325-8025