



GUIDE TO CREATING A

LASTING LEGACY



Jewish Federation of Omaha

Foundation

It's more than a donation. *It's your legacy.*



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It's your Legacy



The mission of the Jewish Federation of Omaha Foundation is to help assure the stability and continuity of Jewish life and to support communal services in the Omaha area by establishing and accumulating enduring assets for permanent funding resources.



CREATE YOUR LASTING LEGACY

Throughout the years, you have given gifts to the Jewish Federation of Omaha for annual campaigns, special fund drives, supported Jewish Federation agencies, such as the Jewish Community Center, Rose Blumkin Jewish Home, Jewish Family Service, and the Pennie Z. Davis Child Development Center. You also support your synagogue through dues and other fundraising events, the Anti-Defamation League/CRC, Chabad House, the Institute for Holocaust Education, Friedel Jewish



Academy, Nebraska Jewish Historical Society, and other Jewish community organizations. Through the Jewish Federation of Omaha Foundation (JFOF), you can keep those most meaningful gifts coming after your lifetime, touching the lives of generations of Omaha Jews long into the future.

JEWISH FEDERATION OF OMAHA FOUNDATION FUNDS:

Endowment Fund

Give a gift of cash or appreciated assets (securities and real estate) to establish an endowment at the JFOF. Designate the Federation or your favorite Omaha-area Jewish charitable organization or program to receive distributions annually from your endowment fund.

Donor-Advised Fund

A donor-advised fund is a simple, tax-smart investment solution for charitable giving. It is like a personal charitable checking account at the JFOF. You contribute cash, securities, or other appreciated assets, you may be eligible for a current year tax deduction and you can be more strategic about your giving decisions. You retain influence over distribution of these charitable dollars during your lifetime, and then leave the remainder to the JFOF after your death to continue your legacy.

Supporting Foundation

A Supporting Foundation at the JFOF allows you and your family to invest and control your charitable dollars while supporting Omaha's Jewish community.



“We hope that with our gift we will enable some young person to be able to go to camp, or to have a scholarship to go to a school, or an opportunity that he or she might not have. We realize the importance of giving and being a part of a community that does give.”

-Joanne Freeman



LEARN MORE ABOUT THE JEWISH FEDERATION OF OMAHA FOUNDATION'S WAYS TO GIVE:

Cash, Appreciated Securities, Real Estate and Other Assets

Donating any of these gifts will likely reduce your income tax burden. You achieve charitable goals while helping the JFOF.

Bequest

Designate the JFOF as a beneficiary in your will. It is easy and revocable if circumstances change.

Charitable Gift Annuity

Increase your cash flow from a gift that provides guaranteed fixed payments for life at rates considerably higher than low-earning CDs and receive a charitable income tax deduction. For Nebraska residents over 75 years of age.

Charitable Lead Trust

Greatly reduce or avoid income and estate taxes on trust assets passing to family. A legally binding agreement that puts assets into a charitable trust. Trust income goes to the JFOF for a number of years first. Thereafter, wealth transfers to family members of your choice.

Charitable Remainder Trust

A legally binding agreement that puts assets into a charitable trust and gives you or your family members income for life, or a designated number of years. Thereafter, the remaining assets go to the JFOF. You get an immediate charitable income tax deduction and steady cash flow.

Family Business Stock

When you are ready to transfer or sell the business, there are tax and charitable reasons for including the JFOF in the transaction.

Life Insurance

Set up a new life insurance policy with the JFOF as the owner and beneficiary. You make tax deductible contributions to the JFOF which pay the annual premiums. Alternatively, designate the JFOF as the beneficiary of your current life insurance policy. You continue to own the policy during your lifetime. The policy will be included in your taxable estate when you pass away, but your estate will benefit from an estate tax charitable deduction for the value of the gift to JFOF.

Living Trust

Name the JFOF as a beneficiary of your living trust.

Retirement Assets (i.e. IRA, 401 (k), 403 (b))

Name the JFOF as a beneficiary of your qualified retirement plan. Your children may pay significant income and estate taxes if they inherit retirement assets. However, those assets will pass tax-free if left to the JFOF.



“I have supported Omaha’s Jewish community throughout my lifetime. I wanted to do some giving now so I could see the benefits during my life, and I also want to continue that support after I am gone. The Jewish Federation of Omaha Foundation helped me make that possible. The Foundation staff showed me how I could give a gift now, gifts each year for the next few years, and an additional gift after my lifetime through my estate plan. The Bruce Meyers LIFE & LEGACY Endowment Fund is now a reality. The Jewish Federation of Omaha Foundation made it very easy for me to fulfill my philanthropic goals.”

–Bruce Meyers



CREATE A LASTING LEGACY TO FIT

your goals, your lifestyle, and your personal and family values.

MAKE A GIFT NOW

Make a GIFT NOW to the Jewish Federation of Omaha Foundaton and enjoy watching your contibutions benefit the community.



BENEFITS:

- Receive immediate income tax benefits.
- Avoid capital gains taxes on assets that increased in value.
- Transfer the expenses of insuring or maintaining assets you no longer need.

GIVE NOW:

- Appreciated Securities, Real Estate and Other Assets
- Cash
- Charitable Gift Annuity
- Charitable Lead Trust
- Charitable Remainder Trust
- Family Business Stock
- Life Insurance

DEFER A GIFT until after your lifetime

Designate a gift to the Jewish Federation of Omaha Foundaton and your contribution will benefit the community for many years after your lifetime.



BENEFITS:

- Maintain your current lifestyle.
- Flexibility to change your plans as life changes.
- Pass on your retirement plan assets to the Foundation tax-free in the future.
- Pass on other assets as a charitable donation after your lifetime.

GIVE LATER:

- Appreciated Securities, Real Estate and Other Assets
- Bequest in Your Will
- Charitable Gift Annuity
- Charitable Remainder Trust
- Living Trust
- Retirement Assets (i.e. IRA, 401 (k), 403 (b))
- Life Insurance



For more information on making a
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