

LEGACY GIVING AT JRC

Getting Started

To help sustain JRC's spiritual community for generations to come as part of your legacy, here are a few options to consider:

Make a bequest

A bequest is a gift made through your will or trust. It is one of the most popular and flexible ways that you can support JRC.

Benefits

- You may lessen the burden of taxes on your family
- You may receive estate tax savings
- You leave a lasting legacy to be remembered at an organization that is important to you

Designate JRC as a beneficiary

A beneficiary designation gift is a simple and affordable way to make a gift to support JRC's mission. You simply designate JRC as a beneficiary of your life insurance policy, or a retirement, investment or bank account.

Benefits

- Continue to use your account as long as you need to
- Simplify your planning
- Support the cause that you care deeply about

Give to JRC or to the JRC Foundation

JRC accepts gifts to both the congregation and the JRC Foundation, a separate entity that holds an endowment generating income for JRC's benefit. By leaving your gift to JRC directly, your gift may have more immediate impact, and gives the Board the flexibility as to when and how to use the funds.

By leaving your gift to The JRC Foundation, your funds will become part of the endowment and be invested to generate income that will benefit JRC in perpetuity. However you decide to leave your legacy gift, we will honor you as a member of the *L'Dor v'Dor Legacy Circle*.



Check with your advisors on these and other ways to leave a legacy at JRC

Please consult your legal and financial advisors with regard to your legacy gift, including ideas for giving in addition to bequests or beneficiary designations.

For more information

Contact JRC's Executive Director at 847-328-7678 or email giving@jrctogether.org



Jewish Reconstructionist Congregation

JRC is a diverse, participatory, and sacred community dedicated to a daring, deeply-rooted Judaism

The L'Dor v'Dor Legacy Circle



JRC's *L'Dor v'Dor Legacy Circle* honors individuals or families who make estate or beneficiary commitments of any size, or establish other forms of legacy gifts, ensuring that our congregation and its values endure for generations. Just as those who came before us built a strong and inclusive Jewish community, members of the *L'Dor v'Dor Legacy Circle* help secure JRC's future—sustaining our spiritual and cultural home, enriching our programs, and deepening our impact for years to come.

By including JRC in your estate plans, you strengthen our community today and lay the foundation for a vibrant tomorrow. Your generosity ensures that JRC continues to adapt and meet the changes in society and culture, remaining a welcoming, progressive, and dynamic Jewish community for all who seek it.

***L'Dor v'Dor Legacy Circle* Benefits**

- Recognition on the JRC website, in publications, and at special events (unless anonymity is requested)
- Invitations to special JRC gatherings honoring donors and volunteers
- Donor spotlight in JRC's newsletter, if desired by the donor
- A welcome letter and commemorative *L'Dor v'Dor Legacy Circle* pin



To join JRC's *L'Dor v'Dor Legacy Circle*, get more information, or let us know that you have included JRC in your estate planning, contact us at giving@jrctogether.org

Thank you for ensuring that JRC continues to thrive for generations to come!



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Bequests and Sample Language

One meaningful way to sustain JRC for generations to come is by including a bequest in your will, living trust, or codicil (amendment) to your will.

TYPES OF BEQUESTS

Specific Bequest. A specific bequest involves making a gift of a specific asset such as property or a gift for a specific dollar amount. For example, you may wish to leave \$18,000 to JRC.

Percentage Bequest. Another kind of bequest involves leaving a designated percentage of your overall estate to charity. For example, you may wish to leave 18% of your estate to JRC.

Residual Bequest. A residual bequest is made from the balance of an estate after the will or trust has disbursed each of the specific bequests. A common residual bequest involves leaving a percentage of the residue of the estate to charity. For example, you may wish to leave 36% of the residue of your estate to JRC.

Contingent Bequest. A contingent bequest is made to charity only if the purpose of the primary bequest cannot be met. For example, you could leave specific property, such as a vacation home, to a relative, but the bequest language could provide that if the relative is not alive at the time of your death, the proceeds of the sale of the vacation home would go to JRC.

BEQUEST BENEFITS

A bequest is a flexible and revocable way to support JRC, meaning you can update or modify it at any time. You can designate your bequest for a specific purpose or allow it to be used where it is needed most. Additionally, bequests may provide estate tax benefits and maximize the inheritance for your loved ones.

BEQUEST LANGUAGE

To make a bequest, please start by speaking with your attorney. Your attorney can help you include a bequest to JRC in your estate plan. We have provided some sample bequest language to assist you and your attorney.

1. Specific Bequest Sample Language

Bequest of a Specific Dollar Amount

I hereby give, devise and bequeath _____ and no/100 dollars (\$DOLLARS) to Jewish Reconstructionist Congregation, a nonprofit organization located at 303 Dodge Avenue, Evanston, IL 60202, Federal Tax ID 36-6118264, for Jewish Reconstructionist Congregation's general use and purpose.

Bequest of Specific Personal Property

Acceptance of property may be subject to restrictions. Please consult JRC in advance.

I hereby give, devise and bequeath DESCRIPTION OF PROPERTY to Jewish Reconstructionist Congregation, a nonprofit organization located at 303 Dodge Avenue, Evanston, IL 60202, Federal Tax ID 36-6118264, for Jewish Reconstructionist Congregation's general use and purpose.



2. Percentage Bequest Sample Language

I hereby give, devise and bequeath ____ percent (____%) of my total estate, determined as of the date of my death, to Jewish Reconstructionist Congregation, a nonprofit organization located at 303 Dodge Avenue, Evanston, IL 60202, Federal Tax ID 36-6118264, for Jewish Reconstructionist Congregation's general use and purpose.

3. Residual Bequest Sample Language

I hereby give, devise and bequeath to Jewish Reconstructionist Congregation, a nonprofit organization located at 303 Dodge Avenue, Evanston, IL 60202, Federal Tax ID 36-6118264, ALL OR A PERCENTAGE of the rest, residue and remainder of my estate to be used for Jewish Reconstructionist Congregation's general use and purpose.

4. Contingent Bequest

If (primary beneficiary) does not survive me, then I hereby give, devise and bequeath to Jewish Reconstructionist Congregation, a nonprofit organization located at 303 Dodge Avenue, Evanston, IL 60202, Federal Tax ID 36-6118264, DESCRIPTION OF PROPERTY to be used for Jewish Reconstructionist Congregation's general use and purpose.

BEQUESTS TO JRC FOUNDATION

You may utilize similar language as described above to make bequests to the JRC Foundation, thereby contributing to an endowment formed with the purpose of generating income that contributes to JRC's annual operating expenses. To do so, replace the identifying language for JRC with "JRC Foundation, a nonprofit organization located at 303 Dodge Avenue, Evanston, IL 60202, Federal Tax ID 36-3555898."

Please contact us if you would like to discuss whether to make a gift directly to JRC or to the JRC Foundation.

RESTRICTED BEQUESTS

If you are considering a bequest but would like to ensure that your bequest will be used for a specific purpose or project, please let us know. We will work with you and your attorney to help you identify ways to give and meet your charitable objectives.

If you are making a restricted bequest, we recommend that your attorney include the following provision to give JRC flexibility should it no longer be possible for JRC to use your gift as you originally intended:

"If, in the judgment of the Board of Directors of Jewish Reconstructionist Congregation, it shall become impossible for Jewish Reconstructionist Congregation to use this bequest to accomplish the specific purposes of this bequest, Jewish Reconstructionist Congregation may use the income and principal of this gift for such purpose or purposes as the Board determines is most closely related to the restricted purpose of my bequest."

LET'S DISCUSS

Please contact us if you have any questions or need additional information about how to make a bequest to JRC. If you have included a legacy gift to JRC in your estate plan, please complete the Legacy Gift Notification form (or just let us know), so we can thank you and recognize you as a member of the *L'Dor v'Dor Legacy Circle*. Contact JRC's Executive Director at 847-328-7678 or giving@jrctogether.org.



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Jewish Reconstructionist Congregation Legacy Gift Notification

As a demonstration of my/our support of JRC, I am/we are pleased to have made a bequest provision as indicated below:

Legacy Giving Vehicle*

**Please check applicable options*

Legacy Giving Vehicle*	Value of Gift	-OR-	Percentage Allocated/ Estimated Value of Gift
<input type="checkbox"/> Will or Revocable Trust	_____		_____ / _____
<input type="checkbox"/> Life Insurance Policy <i>Beneficiary Designation</i>	_____		_____ / _____
<input type="checkbox"/> Retirement Plan (401(k),IRA) <i>Beneficiary Designation</i>	_____		_____ / _____
<input type="checkbox"/> Other _____ <i>Please Describe</i>	_____		_____ / _____

****To facilitate our ability to honor your intentions set forth above, we would greatly appreciate a copy of the indicated document (or the appropriate sections thereof) for safekeeping in our confidential files. Thank you.***

I/We understand this form does not create a binding obligation, all gifts are revocable, and any details about my/our gift will remain confidential unless I/we say otherwise. JRC understands that the amount of my/our future gift may change or be terminated.

Donor Name (print) _____

Signature _____ **Date** _____

Spouse Name if joint (print) _____

Spouse Signature if joint _____ **Date** _____

Address _____ **City** _____ **State** _____ **Zip** _____

Continued...

Please return this form to: JRC | Attn: Executive Director | 303 Dodge, Evanston, IL 60202 |
Phone: 847-328-7678 | email: giving@jrctogether.org

Jewish Reconstructionist Congregation Legacy Gift Notification, Cont'd

Gift Purpose

If / when this gift is made, it is my wish that it be used for the following purpose:

- Gift made directly to JRC for general purposes, for an area of greatest need, or for deposit into the JRC Foundation as part of the endowment, at the discretion of the JRC board.
- Gift made to the JRC Foundation to be included in an endowment for investment to create income stream in perpetuity.
- Please contact me to discuss these options or other ways my gift can be used.

Recognition

Donors who provide a planned gift to JRC will be welcomed into the *L'Dor v'Dor Legacy Circle*, which honors those who have made legacy gifts to the organization. The *L'Dor v'Dor Legacy Circle* provides members with opportunities to connect with others interested in JRC's important work and learn more about our recent endeavors. JRC honors your commitment to our diverse, participatory, and sacred community dedicated to daring, deeply-rooted Judaism.

- Please list me/us as member(s) of the L'Dor v'Dor Legacy Circle as follows:

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- I/we prefer no public recognition and would like to remain anonymous

Thank you for your commitment to include JRC in your estate plans. We ask that you complete this form with as much detail as you feel comfortable sharing. Any information about your gift will remain confidential and will not create a binding obligation. As always, please consult your financial, tax, and legal advisors while making these decisions. We are grateful for your vision and generosity.

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