



Family Matters

JEWISH FAMILY AND CHILDREN'S SERVICES PERMANENT ENDOWMENT FUND

Suggested Bequest Language

There are different kinds of bequests, each requiring specific language to direct your assets in a way that successfully carries out your final wishes.

Unrestricted bequest language

These bequests are extremely valuable, since they allow JFCS to meet future needs flexibly and imaginatively.

"I give, devise, and bequeath to Jewish Family and Children's Services of San Francisco, the Peninsula, Marin and Sonoma Counties (Tax ID # 94-115

6528), the sum of \$ _____

[or] the following described property _____

[or] _____ % of my estate

[or] the residue of my estate for its general purposes."

Language for a restricted bequest

These bequests support ongoing specific JFCS needs.

"I give, devise, and bequeath to Jewish Family and Children's Services of San Francisco, the Peninsula, Marin and Sonoma Counties (Tax ID #94-115

6528), the sum of \$ _____

[or] the following described property _____

[or] _____ % of my estate

[or] the residue of my estate to be used for the following purpose: (state the purpose)

If at any time in the judgment of the Board of Directors of Jewish Family and Children's Services it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose closest to the designated purpose."

(Please see reverse)



BEQUESTS MADE THROUGH WILLS OR LIVING TRUSTS ARE THE MOST POPULAR FORM OF LEGACY GIVING, COMPRISING 80 – 85% OF ALL PLANNED GIFTS. SURPRISINGLY, IT IS INDIVIDUALS AGES 40 – 50, FOLLOWED BY INDIVIDUALS AGES 50 – 60, WHO REPORT THE HIGHEST FREQUENCY OF BEQUEST COMMITMENTS TO CHARITY. NEVER PUT OFF UNTIL TOMORROW WHAT YOU CAN DO TODAY! GIVING BY BEQUEST COSTS NOTHING NOW, YET MAY GIVE YOU A GREAT DEAL OF SATISFACTION TO KNOW THAT YOUR FUTURE GIFT WILL LIVE ON.

FOR INFORMATION, CONTACT
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**Jewish
Family and
Children's
Services**

OF SAN FRANCISCO, THE PENINSULA,
MARIN AND SONOMA COUNTIES



Language for a bequest for endowment

These bequests provide income and/or principal every year in perpetuity. The principal of the gift is not spent.

"I give, devise, and bequeath to Jewish Family and Children's Services of San Francisco, the Peninsula, Marin and Sonoma Counties (Tax ID #94-115 6528), the sum of \$ _____ [or] the following described property _____ [or] _____% of my estate [or] the residue of my estate to establish an endowed Named Fund to be known as the (state the fund name) _____ with distributions of income and/or principal to be distributed no less than annually and to be used for its general purposes [or] the following purpose: (state the purpose) _____. If at any time in the judgment of the Board of Directors of Jewish Family and Children's Services it is impossible or impracticable to carry out exactly the designated purpose, they shall determine an alternative purpose closest to the designated purpose."

Adding a codicil to an existing will to include a charitable bequest:

"This is a codicil to my will dated (provide date) _____. I devise and bequeath the sum of \$

[or] the following described property (describe property) _____ [or] _____% of my estate [or] the residue of my estate to be used for its general purposes (or state the purpose, including whether the bequest is to be used to establish a permanent endowment) to Jewish Family and Children's Services of San Francisco, the Peninsula, Marin and Sonoma Counties (Tax ID #94-115 6528). In all other respects I confirm my said will."

Signed: _____

Witnessed By: _____ *Dated:* _____

Bequest "How To" Points to Remember

JFCS' charitable planning specialists are available to work with you to identify particular service areas that match your intentions. Review your wishes with an attorney and/or financial advisor before making provisions in a will or trust, or adding a codicil to your existing document. Try to state your wishes as broadly as possible within your desired area of designation, since services and programs may adapt to meet the changing needs of our community. We encourage you to let us know if you have provided for JFCS in your will or trust so that we can thank you and discuss how you would like your gift to be earmarked. If you notify JFCS of your intention to make a bequest, we will be pleased to recognize you as a member of our Heritage Circle during your lifetime.

To Learn More

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