



175 YEARS
Jewish Family and Children's Services

Caring for our Bay Area Community, Always

Care for Your Bay Area Community, from Generation to Generation

Include JFCS in Your Estate Plan

Generations before us built the foundation, guided by the Jewish traditions of advancing human dignity for everyone, community responsibility, intergenerational ties, and repairing the world. They contributed their time, expertise, and resources to weave a reliable safety net for people of all ages—one that has served our community for 175 years.

Now you have the opportunity to make a profound and lasting impact on future generations.

By including a bequest in your will or estate plan, you will help to make sure JFCS will always be here to strengthen individuals, families, and our entire Bay Area community today and for generations to come.

Benefits of a Bequest to You

- Including a future gift does not affect you financially during your lifetime.
- You can provide for your family, first and foremost, and include a gift to support services that are important to you.
- You can make changes at any time.
- You may be able to make a larger gift than you could during your lifetime.
- Bequests of certain assets can reduce taxes for your estate and loved ones.

How to Make a Bequest

There are many ways to leave a legacy. Your attorney or financial professional can help you determine the best way to make your gift. You will find suggested language on the reverse side of this sheet.

Some options to consider:

- You can leave a specific percentage of your estate—even 1% will strengthen JFCS' safety net.
- You can designate a dollar amount.
- You can leave a percentage of funds remaining after your other wishes and obligations are satisfied.
- You can make JFCS a contingent or secondary beneficiary in the event other specific gifts cannot be fulfilled.

Gifts are gratefully received in any amount.



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 wishes. Each begins the same way and language you can use follows:

I give, devise, and bequeath to Jewish Family and Children’s Services of San Francisco, the Peninsula, Marin and Sonoma Counties (Tax ID #94-1156528)

Option 1: the sum of \$ _____

Option 2: the following described property:
_____.

Option 3: _____% of my estate

Option 4: the residue of my estate

For an unrestricted bequest, which allows JFCS the flexibility to meet future needs:
for its general purposes.

For a restricted bequest:
to be used for the following 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.

For an endowment bequest, ensuring annual distributions of income while the principal continues to grow in perpetuity:
to establish a Named Endowment Fund to be known as the _____ Fund with annual distributions of income to be used for the following 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.

Contact Us

Our charitable planning specialists are available to answer any questions you may have.

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You also can learn more by visiting
www.jfcs.org/bequests.

If you let us know your future intentions, we would love to welcome you to the **Heritage Circle**—the community of supporters building a lasting legacy with JFCS—and express our gratitude.

Please consider completing a **Letter of Intent**. While completely non-binding, having a record helps us ensure your wishes will be fulfilled. A simple form is available at www.jfcs.org/bequests. Or, contact us to request a copy.

Thank you for your commitment to building a stronger, more resilient community—from generation to generation.

As with all important financial decisions, you may want to consult legal and financial professionals for advice.