



Jewish Federation
OF GREATER INDIANAPOLIS

Planned Giving
and Endowment

THE **STRENGTH** OF A PEOPLE.
THE **POWER** OF COMMUNITY.

LIFE INSURANCE

CREATE A JEWISH LEGACY

Life insurance can be used to fund a charitable gift, enabling you to make a substantial legacy gift for a relatively modest outlay.



LIFE INSURANCE

CREATE A JEWISH LEGACY



A gift of life insurance is easy to arrange and administer.

For additional information, contact Rebecca Schalit-Newman at (317) 715-9266. All inquiries are confidential.

This material is presented for informational purposes only and should not be construed as legal, tax or financial advice. When considering gift-planning strategies, you should always consult with your own legal and tax advisors.

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What is it?

- You can use your life insurance to fund a charitable gift to the Jewish Federation of Greater Indianapolis, with a new policy or policies no longer needed for their original purpose.

What are the benefits?

- The Federation will use the policy proceeds for purposes that you specify.
- A gift of life insurance is easy to arrange and administer.
- You may be able to make a more significant gift than you thought possible.

How does it work?

- You name the Federation as owner and beneficiary of your existing policy. When you make your gift, you are entitled to a charitable income tax deduction that may be sizeable, and the policy proceeds will be payable to the Federation.
- You purchase a new policy and name the Jewish Federation of Greater Indianapolis as owner and beneficiary. You may make contributions to the Federation that the Federation may use to pay the premiums.
- You name the Federation as beneficiary of your policy and retain ownership. The proceeds are includable in your taxable estate but can be offset with a charitable tax deduction.