

LETTER OF INTENT

MAKE YOUR LEGACY A VIBRANT JEWISH TOMORROW



Champaign-Urbana
Jewish Federation

Please choose one:

I/We have already made a legacy gift provision in my/our estate plan.

OR

I/We will make a legacy gift provision in my/our estate plan within the next ____ months.

DONOR NAME(S) _____

ADDRESS _____

PHONE(S) _____

EMAIL(S) _____

DATE(S) OF BIRTH _____

I/WE INTEND TO MAKE MY/OUR GIFT TO THE JEWISH COMMUNITY THROUGH:

- GIFT IN YOUR WILL OR TRUST
- RETIREMENT FUNDS
- LIFE INSURANCE POLICY
- CASH
- ASSETS: SECURITIES, REAL ESTATE, OTHER
- OTHER (PLEASE SPECIFY) _____

(Optional) Please share the name and contact of the law firm managing your estate:

I/We give permission to include my/our name(s) on a legacy donor list to inspire and encourage others to join us.

My/our names should appear as follows: _____

I/We prefer to remain anonymous at this time.

Donor Signature(s) _____ Date _____

Contacted by _____

This commitment is not a legal obligation and may be modified at donor discretion.

PLEASE RETURN COMPLETED AND SIGNED FORM TO THE CU JEWISH FEDERATION OR

MA'AYAN WEINBERG, 503 E JOHN ST, CHAMPAIGN, IL 61820

CUJF@CUJF.ORG | 217.367.9872

WHAT IS A PACE FUND?

Should your charitable legacy extend beyond your lifetime?

Have you considered how you could help those in need and enrich Jewish life into the future?

Would you like your annual contribution to The Champaign-Urbana Jewish Federation Annual Campaign to be sustained in perpetuity?

At A Glance - Perpetual Annual Campaign Endowments

- Enables your gift to The Champaign-Urbana Jewish Federation Annual Campaign to be made in perpetuity in your name or in the name of a loved one
- May be structured in a variety of innovative ways
- Offers tax benefits for you and/or your estate
- A Perpetual Annual Campaign Endowment (PACE) is a permanent fund endowing your Annual Campaign gift—a lasting legacy that will continue to make an annual gift to The Champaign-Urbana Jewish Federation Annual Campaign

You may create a PACE fund through a variety of vehicles during your life or in your estate. Among the ways to establish a PACE fund are:

- Gift of cash or other assets
- Bequest or trust distribution
- Gift of life insurance
- Gift of IRA or pension plans
- Charitable life income plan - *A charitable remainder trust offers life income payments and a current tax deduction. The remainder of the trust can be used to create a PACE fund.*

To estimate the amount you need to fully endow your campaign gift, multiply your current annual gift by thirty-three. Alternatively, you may endow a portion of your gift by establishing a PACE fund with a lesser amount, perhaps building up the fund through subsequent contributions. The minimum contribution for a PACE fund is \$18,000 starting in January 2024.

For more information, contact Ma'ayan Weinberg at 217-367-9872 or maayan@cujf.org