

Your Legacy Plan

in

5

easy steps

1 Meet with the Jewish Community Foundation (JCF) to develop your plan

Complimentary and Confidential:

All legacy planning phone calls, meetings, and changes are offered at no charge.

To schedule a meeting, please contact:

legacy@jcfsandiego.org or (858) 279-2740.

2 Select one or more causes to support

Example: Your synagogue, favorite organization or alma mater, Jewish and/or secular

3 Decide what to donate

In consultation with your professional advisor, select the asset that best suits your circumstances.

Example: Your will or trust, retirement account, or real estate

4 Use this language to accomplish your charitable goals

Jewish Community Foundation San Diego
(Tax ID number 95-2504044)

To be distributed according to the most recently dated Legacy Instructions on file with the Jewish Community Foundation.

Example: On your IRA Beneficiary Form or in your will or trust

5 Sign your completed Legacy Instructions

JCF will customize your legacy plan honoring your intentions, and you may make changes at any time at no charge.

Celebrate!



Join us at our community-wide Legacy Appreciation Celebrations, and participate by signing the **Book of Life**.

Thank you for Creating Your Legacy