

CREATE A LASTING LEGACY MAKE A PLANNED GIFT TO TEMPLE ISAIAH

One of the greatest gifts someone can give is that of a legacy - a gift that will provide for the present and future of their community. Temple Isaiah offers many options for planned giving that can make a lasting impact and serve as pillars for our congregation's future.

Bequests

A bequest is a wonderful and easy way to leave a legacy gift to Temple Isaiah. A specific amount or percentage of your estate is designated in your will or trust to go to Temple Isaiah. This planned gift will allow Temple Isaiah to continue its important work for generations to come, while not affecting your current assets. This type of gift will also create a charitable deduction which will reduce estate taxes.

Retirement Accounts

Did you know you can easily designate all or a portion (percentage or dollar amount) of your retirement account to Temple Isaiah? Well you can, and in the process leave a meaningful gift to your community. This gift allows the donor's heirs to save on estate taxes, as well as income taxes, upon distribution of the retirement account to the Temple.

Gifts of Stock

For those wishing to make an immediate impact on programs and services at Temple Isaiah, a gift of appreciated stock is an ideal choice. This gift has two major advantages for the donor, an income tax deduction for the gift, as well as no payment of capital gains on the increase in value of the stock.

Charitable Remainder Trust

In this type of planned gift, the donor would work with his/her attorney to set up a trust. The trust would distribute a specified percentage of income to the donor for a predetermined number of years. The remainder value of the funds in the trust would generate a lifetime charitable deduction for the donor. Funds in the trust upon the donor's death would be distributed to Temple Isaiah. These funds would not be subject to estate taxes upon the donor's death.

Life Insurance

There are two options for planned gifts to Temple Isaiah involving Life Insurance. The first is naming Isaiah as a beneficiary on an existing policy. Funds would be distributed tax-free upon the donor's death to the Temple. Another alternative is to purchase a new policy and donate the policy to Temple Isaiah. In this case, the donor would receive an income tax deduction for the amount of the policy premiums paid, and the life insurance policy payments would not be taxed upon death.



For more information about planned giving to Temple Isaiah, please call (310) 277-2772.

*Please note, the examples provided above are not meant as legal or tax advice. For information pertaining to your personal circumstances please contact your own attorney and/or financial advisor.