

# Create Your Jewish Legacy

Invest in Jewish  
Tomorrow Today

Create Your Jewish Legacy (CJL) is a collaborative program, facilitated by the Foundation for the Charlotte Jewish Community (FCJC) to grow endowments through legacy giving. CJL supports local Jewish organizations by helping identify, educate, and steward current and prospective legacy donors.



## What is legacy giving?

Legacy giving is focused on the future. It is an after-lifetime gift that allows individuals to leave a lasting impact, supporting the organizations that play an important role in their lives. Legacy giving is typically arranged through estate planning and takes effect after the donor passes away. Common forms of legacy gifts include gifts in a will, beneficiary designations on retirement accounts and life insurance policies.

## Legacy Giving Matters – This Is Why

A legacy gift strengthens the long-term stability of our Jewish organizations and ensures that our community thrives long into the future. These gifts reflect a donor's deep commitment to the mission of the organizations. More than a donation, a legacy gift is a commitment to building a vibrant future for our community—one that will prosper from generation to generation.

## Considering Leaving a Legacy Gift?

It is a meaningful way make a lasting impact by supporting the causes and organizations that reflect your values, beliefs, and commitment to the future of our Jewish community. It's a statement of hope, identity, and community love and a way to give without requiring resources you rely on today.

### Community Partner Organizations:



For more information, contact Abby Kleber at 704-973-4554  
or [akleber@charlottejewishfoundation.org](mailto:akleber@charlottejewishfoundation.org).

## How To Create Your Jewish Legacy

Legacy giving is flexible and can be tailored to your personal circumstances. Talk with your professional or financial advisor to determine what works best for you and your family. However you choose to give, your commitment will make a lasting difference.

Giving Options	How It Works
Estate or Will	Add your favorite Jewish organization in your will by leaving a percentage, a set amount, or a specific asset.
Retirement Account* (401k or IRA)	Name a Jewish organization as a beneficiary of your retirement account.
Life Insurance Policy	Designate your organization as a beneficiary of a new or existing policy.

*\*Individuals 70 ½ or older can give a gift directly from their IRA to a charity that counts toward their required minimum distribution and is excluded from taxable income.*

## Start the Conversation

- Talk with your favorite organizations to discover how to make a legacy gift without impacting your current budget. You may also consider a lifetime gift to create a new endowment.
- FCJC is here to guide you through the technical aspects and partner with your financial and legal advisors to craft a plan that aligns with your goals and passions.

There's no better time than today to create your Jewish legacy.

Take the first step—we'll be with you every step of the way, offering guidance and support.

Together, we'll ensure Jewish life in Charlotte continues to grow and thrive for generations to come.



*Inspiring Philanthropy.  
Building Community.*



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