

PERPETUAL ANNUAL CAMPAIGN ENDOWMENT



Jewish Federation
OF NORTHERN NEW JERSEY

When you establish a PACE,
you create a lasting legacy that helps ensure
the future vitality of our Jewish community.



PERPETUAL ANNUAL CAMPAIGN ENDOWMENT

Protect what's most important to you. Transmit your Jewish values. Invest in our Jewish future. A Perpetual Annual Campaign Endowment (PACE) allows you to perpetuate your annual gift to Jewish Federation.

How does it work?

An endowment can be funded over time or with a single gift. The money contributed is used to establish a Perpetual Annual Campaign Endowment Fund in your name. The fund is invested in Federation's Endowment Foundation for long term growth. Each year, a distribution is made from your PACE Fund to Federation to perpetuate your annual support.

PACE Funds may be established by a man, woman or a couple. The minimum amount necessary to establish a PACE Fund is \$25,000. This is expected to generate a \$1,250 annual gift. A PACE Fund at the Dor L'Dor level requires a minimum contribution of \$100,000. This amount is intended to generate a \$5,000 gift each year.

To calculate the amount needed to perpetuate your annual support, simply multiply your desired annual gift amount by 20.

Here are some ways you can fulfill a PACE gift:

- Donate cash or securities during your lifetime.
- Leave a gift to Federation in your Will.
- Gift a new or existing life insurance policy by naming "Federation" as owner and beneficiary of the policy.
- Complete a "Beneficiary Designation Form" with your IRA administrator which lists Federation as a beneficiary.
- Include Federation as a charitable beneficiary of your Donor Advised Fund after your lifetime.

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 are the benefits?

- **Recognition.** You are recognized as a PACE donor when you announce your commitment to make this enduring gift. With a minimum commitment of \$100,000, you will be:
 - ~ recognized as a member of Federation's Dor L'Dor Society and have your name inscribed on our legacy wall.
 - ~ invited to events for our Major Gift donors.
 - ~ offered a custom-made gold PACE lapel pin.
 - ~ receive a special *tzedakah* box.
 - ~ invited to participate in Federation's Endowment Book of Life.
- **Tax Benefits.** You may receive estate and/or income tax benefits depending on your specific situation and the funding method chosen.
- **Impact.** Your gift will generate future income to support Federation.
- **Values.** This gift makes a statement to your children and grandchildren about your Jewish values and commitment to Jewish life and continuity.

Jewish Federation's endowment staff is available to work with you and your financial and legal advisors to help you realize your philanthropic goals.

