

Creating Your Jewish Legacy: Lunch, Learn & Laugh

January 28, 2020 at Noon at the JCC

You'll be remembered forever in the Jewish community with a gift in your will, trust, retirement account or life insurance policy.

*What does that **really mean** and how do you **make it happen**?*

"To Do" LIST

- Do I/we have an up-to-date will? Trust? Are our current charitable wishes reflected?
- Check/Update the beneficiary designations for my:
 - IRA + Bank account(s) (POD)
 - Other retirement plan(s) + Brokerage account(s) (TOD)
 - Life insurance policy(ies)
- Consider speaking to financial advisor, estate planning attorney about incorporating my/our legacy wishes into my/our overall plans. Topics to discuss:
 - Make an after-lifetime charitable endowment gift?
 - Make a charitable endowment gift during lifetime?
 - Create a donor advised fund during lifetime? *L'Dor v' Dor*: Include children, grandchildren as successor advisors to fund?
 - Create an endowment fund to support specific organization(s)/cause(s) during or after lifetime?
 - If yes to possibilities above, discuss what asset(s) to use to make the gift(s).
- Meet with Erika Rimson, JCFNM Exec. Director, to learn more about creating charitable fund.
- Talk with family about connecting our values with our "valuables."



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Organizations participating in the LIFE & LEGACY New Mexico initiative:

Legal Name & Federal ID # for designating after-lifetime endowment gifts.

Organization	EIN
Congregation Albert of Albuquerque New Mexico	85-0124933
Congregation B'nai Israel	85-0159160
HaMakom	85-0461363
Jewish Care Program – donation to The Jewish Federation of New Mexico for JCP	85-0158242
Jewish Community Center of Greater Albuquerque, Inc.	85-0457178
Jewish Community Foundation of New Mexico	46-4161463
The Jewish Federation of New Mexico	85-0158242
Nahalat Shalom Inc.	85-0352779
The New Mexico Jewish Historical Society	85-0350614
Temple Beth Shalom	85-0162318



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