

# THE JEWISH *Legacy* SOCIETY

## OF NEW MEXICO

Since the first wave of Jewish immigration to the New Mexico territory in the mid-19th century to the present, visionary families offered the philanthropic support and leadership to help take our community from strength to strength. In the spirit of these families, the Jewish Community Endowment Foundation of New Mexico (JCEF) is launching the *Jewish Legacy Society*.

Your membership in the Foundation's *Jewish Legacy Society* guarantees that the Jewish causes and concerns important to you will be well-provided for—in perpetuity—whether they are located here in our community, across the United States, in Israel, or around the world. Should the focus of your philanthropy extend beyond the Jewish community, the Foundation can ensure that those charitable organizations also continue to benefit from your support.

## WHAT WILL YOUR JEWISH *Legacy* BE?

### Endowment Funds

A permanent fund in your name, in the name of someone you'd like to honor or in a name that is meaningful to you. The fund provides ongoing support to one or more charitable organizations or purposes. Each year a distribution is made from available earnings based on a spending rate.

### Celebration Funds

Celebration of milestones – Bar/Bat Mitzvah, Wedding, Retirement. Family and friends can contribute to the fund and honorees can celebrate their joy by giving back to those most in need locally, in Israel and worldwide.

### Memorial Funds

Commemoration of a loved one's life. JCEF can immediately set up the fund so you, family members, and friends can contribute to the fund. You and your family can then decide where to give to honor your loved one.

### Donor Advised Funds (non-endowed)

An easy way to begin fulfilling your philanthropic vision. Open a fund with a minimum gift of \$5,000. At any time, recommend grants from the fund (minimum of \$250) to charitable organizations of your choosing.

### Life Income – Charitable Gift Annuity

A win-win option. Receive an immediate tax deduction for a portion of your gift, a guaranteed income stream for life, and make a significant gift to a charitable organization.



## Investing in Our Community's Future

Caretaker .....	\$100,000+ Investment
Sustainer.....	\$250,000+ Investment
Trailblazer.....	\$500,000+ Investment

Members of the *Jewish Legacy Society* agree to create a permanent endowment with assets of at least \$100,000. The first 25% of your endowment should be designated to benefit Jewish causes. You can designate the remaining assets of your endowment to support other causes that are important to you—Jewish or non-Jewish, local or global.

No money need change hands right now. All we are asking for is your promise—your promise to create a permanent endowment at the Jewish Community Endowment Foundation of NM. How you fulfill your promise is up to you. You should consult with your attorney, accountant, or other financial professional to determine the best method for you to implement your promise when the time comes. A JCEF representative is available to meet with you and your professional advisors upon your request.

## Background of JCEF

- The Jewish Community Endowment Fund of NM was established in 1997 as a division of the Jewish Federation of Greater Albuquerque (currently Jewish Federation of New Mexico). In 2002 it was renamed the Jewish Community Endowment Foundation of New Mexico and an independent board of trustees was created.
- In December 2005, JCEF entered into a Custodial Agreement with the Jewish Community Foundation of Southern Arizona in Tucson, an Arizona nonprofit corporation with a solid record of investment performance and donor-centered services. All funds held by the JCEF are invested with over \$52 million of Tucson's assets currently under management by SEI, the Foundation's investment manager since 2007. The Tucson Foundation provides JCEF with recordkeeping and reporting support as well as consulting services and assistance in executing planned gifts for the benefit of the New Mexico Jewish community and beyond.

## Total Portfolio Returns as of 12/31/12

	<u>3 Month</u>	<u>1 Year</u>	<u>2 Year</u>	<u>3 Year</u>
Gross	2.1%	13.4%	6.8%	9.1%
Net	2.0%	12.9%	6.4%	8.7%



*Please join me in "spurring" one of the most important initiatives for the future of our community!*

- Art Gardenswartz

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