

# The Jewish Federation of Greater Los Angeles

---

## *MODEL FORMS: BEQUESTS FROM WILLS*

### **A. OUTRIGHT BEQUEST**

I give [\_\_\_\_\_ percent (\_\_\_%) of my estate /or/ \_\_\_\_\_ dollars (\$\_\_\_\_) /or/ the residue of my estate] to The Jewish Federation Council of Greater Los Angeles (The Federation), located at 6505 Wilshire Boulevard, Los Angeles, CA 90048. The Federation's EIN is: 95-1643388.

### **B. GIFT TO FEDERATION'S UNRESTRICTED ENDOWMENT FUND**

I give [\_\_\_\_\_ percent (\_\_\_%) of my estate /or/ \_\_\_\_\_ dollars (\$\_\_\_\_) /or/ the residue of my estate] to the The Jewish Federation Council of Greater Los Angeles (The Federation, EIN: 95-1643388) to be held and administered as part of The Federation's Unrestricted Endowment Fund with distributions to be made as part of The Federation's annual grants process. Distributions shall be made annually based on a spending rate in accordance with The Federation's policy and guidelines.

### **C. GIFT TO A FIELD OF INTEREST FUND\***

I give [\_\_\_\_\_ percent (\_\_\_%) of my estate /or/ \_\_\_\_\_ dollars (\$\_\_\_\_) /or/ the residue of my estate] to the The Jewish Federation Council of Greater Los Angeles (The Federation, EIN: 95-1643388) to be held and administered by The Federation as the \_\_\_\_\_ Endowment Fund. Distributions shall be made annually based on a spending rate in accordance with The Federation's policy and guidelines. Distributions shall be for the following charitable purpose(s):

(Examples: the following three strategic initiatives of Federation would make excellent choices for a field of interest fund)

- Caring for Jews in Need
- Engaging with the Community
- Ensuring the Jewish Future

The Board of Trustees of The Federation may alter the foregoing field of interest designation(s) only in the event that it becomes impossible to fulfill, impracticable or undesirable as determined by The Federation's Board of Trustees.

\* This form is for illustration purposes, The Federation would be pleased to discuss how Field of Interest Funds may be tailored to meet the unique needs of your clients.

### **D. GIFT TO JEWISH FEDERATION RESTRICTED ENDOWMENT FUND**

I give [\_\_\_\_\_ percent (\_\_\_%) of my estate /or/ \_\_\_\_\_ dollars (\$\_\_\_\_) /or/ the residue of my estate] to the Jewish Federation Council of Greater Los Angeles (The Federation, EIN: 95-1643388) to be held and administered by The Federation as a restricted fund for the benefit of the Jewish Community.

The Board of Trustees of The Federation may alter the foregoing designation only in the event that it becomes impossible to fulfill, impracticable or undesirable as determined by The Federation's Board of Trustees.

# The Jewish Federation of Greater Los Angeles

---

## *MODEL FORMS: BEQUESTS FROM LIVING TRUSTS*

### **A. OUTRIGHT BEQUEST**

Upon the death of \_\_\_\_\_ [the Trustor(s)], [the cash the sum of \$ \_\_\_\_\_] or [describe gift] shall be distributed to The Jewish Federation Council of Greater Los Angeles (The Federation), located at 6505 Wilshire Boulevard, Los Angeles, CA 90048. The Federation's EIN is: 95-1643388.

### **B. GIFT TO THE FEDERATION'S UNRESTRICTED ENDOWMENT FUND**

Upon the death of \_\_\_\_\_ [the Trustor(s)], [the cash the sum of \$ \_\_\_\_\_] or [describe gift] shall be distributed to The Jewish Federation Council of Greater Los Angeles (The Federation, EIN: 95-1643388) to be held and administered as part of The Federation's Unrestricted Endowment Fund with distributions to be made as part of The Federation's annual grants process. Distributions shall be made annually based on a spending rate in accordance with The Federation's policy and guidelines.

### **C. GIFT TO A FIELD OF INTEREST FUND\***

Upon the death of \_\_\_\_\_ [the Trustor(s)], [the cash the sum of \$ \_\_\_\_\_] or [describe gift] shall be distributed to The Jewish Federation Council of Greater Los Angeles (The Federation, EIN: 95-1643388) to be held and administered by The Federation as an Endowment Fund. Distributions shall be made annually based on a spending rate in accordance with The Federation's policy and guidelines. Distributions shall be for the following charitable purpose(s):

[Examples: the following three strategic initiatives of Federation would make excellent choices for any field of interest fund]

- Caring for Jews in Need
- Engaging with the Community
- Ensuring the Jewish Future

The Board of Trustees of The Federation may alter the foregoing field of interest designation(s) only in the event that it becomes impossible to fulfill, impracticable or undesirable as determined by The Federation's Board of Trustees.

\* This form is for illustration purposes. The Federation would be pleased to discuss how Field of Interest Funds may be tailored to meet the unique needs of your clients.

### **D. GIFT TO JEWISH FEDERATION RESTRICTED ENDOWMENT FUND**

Upon the death of \_\_\_\_\_ [the Trustor(s)], [cash the sum of \$ \_\_\_\_\_] or [describe gift] shall be distributed to The Jewish Federation Council of Greater Los Angeles (The Federation, EIN: 95-1643388) to be held and administered by The Federation as a restricted fund for the designated purpose of supporting the Federations efforts:

[Examples: to enhance Jewish education for students or adults; to engage young adults in the Jewish community; to help care for Seniors in need...]

The Board of Trustees of The Federation may alter the foregoing designation only in the event that it becomes impossible to fulfill, impracticable or undesirable as determined by The Federation's Board of Trustees.