

## CREATE A LEGACY FOR THE WORLD UNION FOR PROGRESSIVE JUDAISM

# LEGACY GIVING OPTIONS

### CHOOSE THE GIVING VEHICLE THAT MATCHES YOUR LEGACY GOALS:

#### YOUR WILL

You can designate:

- A percentage of your estate
- A specific dollar amount
- Specific property, such as real estate, a coin collection, or a work of art
- Whatever is left in the estate after all other property has been distributed
- A gift that is contingent upon an event or the existence of specific circumstances
- Sample language may include: "I give, devise and bequeath (\$\_\_\_\_\_ or \_\_\_\_\_%) of my residuary estate to WUPJ, Taxpayer ID # 13-1930176."

#### YOUR RETIREMENT ASSETS

- Include WUPJ as an after-lifetime beneficiary
- If you have an existing plan, contact your plan administrator to request a change of beneficiary form

#### YOUR LIFE INSURANCE

- Donate a new policy or an existing policy that is no longer needed
- Name WUPJ as an after-lifetime beneficiary

#### YOUR OTHER OPTIONS

- Designate the remainder of a donor advised fund or private foundation
- Create a new fund with appreciated securities, cash or other assets, such as real estate, mineral rights, royalty interest, IRA charitable rollover and more

**PLEASE NOTE** that these descriptions are informational only and do not constitute legal or tax advice. Please consult with a financial or estate planning professional to understand the implications of your gift

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*For more information, please contact:  
Naomi Smook at [nsmook@wupj.org](mailto:nsmook@wupj.org) or 212-650-4242  
World Union for Progressive Judaism  
633 Third Avenue, 7th Floor, New York, NY 10021*

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# DECLARATION OF INTENT

WITH THIS DECLARATION, I am/we are pleased to be able to provide future generations of Progressive Jews around the world with strong, contemporary Jewish communities- wherever they choose to live.

Please choose one:

I/we have already included a legacy gift for the **World Union for Progressive Judaism (WUPJ)** in my/our estate plan.

OR

I/we will leave a legacy gift and will formalize my/our gift within \_\_\_\_\_ months.

Donor Name (s) \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

My/our gift to WUPJ was completed through a:

Bequest/Will

Retirement Plan Assets (IRA)

Gift of Life Insurance

Other (please specify) \_\_\_\_\_

Optional: The approximate value of my/our promise will be \$\_\_\_\_\_ or \_\_\_\_\_%

I/we give permission to include my/our name(s) in a list of WUPJ Legacy donors to inspire and encourage others.

I/we prefer to remain anonymous

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

This declaration of intent is not a legal obligation and may be changed at donor's discretion

Please complete and return this form to:

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