Helpful tips on formalizing your Legacy Gift to Jewish Family Service of Greater Harrisburg

We wanted to provide you with information on how to make your legacy pledge a reality. We have provided suggested language you can use for each option. Please consult with your legal and/or financial advisors to assure that you understand the potential tax consequences of each option.

Gift in My Will or Trust

- For a Will. I bequeath [the sum of $_____] [___% of the remainder of my estate] to Jewish Family Service of Greater Harrisburg, Inc., 3333 North Front Street, Harrisburg, PA 17110, Federal Tax ID Number: 23-2894802, for its general purposes.
- For a Trust: The Trustee shall distribute [the sum of $_____] [___% of the balance of the trust assets] to Jewish Family Service of Greater Harrisburg, Federal Taxpayer ID Number: 23-2894802, for its general purposes.

Life Insurance: Name "Jewish Family Service of Greater Harrisburg, Inc., 3333 North Front Street, Harrisburg, PA 17110, Federal Tax ID Number: 23-2894802" as primary or contingent beneficiary on the policy's beneficiary designation, available from your life insurance agent or company.

Retirement Plan Account (IRA or 401(k)): Name "Jewish Family Service of Greater Harrisburg, Inc., 3333 North Front Street, Harrisburg, PA 17110, Federal Tax ID Number: 23-2894802" as primary or contingent beneficiary on the policy's beneficiary designation, available from your IRA custodian or plan administrator.

Gift of Real Estate, Securities or other assets. Talk to your legal and tax advisors about rules and options for transferring real estate. Questions may also be directed to _____.