



## **HUC-JIR Bequest Language for Pentera Microsite**

### **Plan Your Bequests to Meet Your Family and Charitable Objectives**

Bequests, also known as gifts by will, have positively impacted HUC-JIR and its students for many years. Such gifts from generous alumni and friends provide essential and valued resources that benefit the College-Institute and our Jewish community for generations to come. Bequests have become an integral part of the American philanthropic tradition because such gifts enable you to make significant contributions that may not have been possible during life.

**General Bequest:** A general bequest is one of the most popular ways to make a charitable gift by will. You simply leave a specified dollar amount to the designated charity.

General Example: “I give Hebrew Union College-Jewish Institute of Religion the sum of [insert dollar amount or percentage, or the rest, residue, and remainder of my estate] to be used for its tax-exempt charitable purposes.”

**Restricted Bequest:** If you prefer to direct your bequest for a specific purpose, a restricted bequest may be the preferred option to consider. For example, you may wish to memorialize a family member or an honored colleague. You should make a restricted bequest in the broadest terms possible to guard against the charitable purposes of your gift becoming obsolete. We encourage you to have a conversation with HUC professionals about the intention of this gift to help craft language that aligns with HUC-JIR's long-term strategies.

Restricted Example: “I give Hebrew Union College-Jewish Institute of Religion (HUC-JIR) [insert dollar amount or percentage, or the rest, residue, and remainder of my estate] to be used for its tax-exempt charitable purposes. This gift shall be held as a permanent endowment to be known as the ‘[Person’s Name] Fund,’ only the income of which may be used to support the [insert tax-exempt charitable purposes for which the gift is to be used]. If the governing board of the HUC-JIR determines in the future that it is not feasible or economical to use the income of the fund for the purpose stated above, the income of the fund may be used for such tax-exempt charitable purposes of HUC-JIR as the governing board directs.”

Note: Please consult your tax and financial advisors concerning the specific consequences of making estate gifts to HUC-JIR.

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Interested in learning more about estate gifts? We would be pleased to discuss, in confidence, ways in which you may support the College-Institute. For more information, please contact Anat Becker, JD, National Director of Legacy Giving, at [abecker@huc.edu](mailto:abecker@huc.edu) or 212.824.2228.