



Jewish Community
Foundation
MILWAUKEE
JEWISH FEDERATION

Lion of Judah Endowment Fact Sheet

What is it?

A Lion of Judah Endowment Fund (LOJE) ensures that your gift of \$5,000 or more to the Milwaukee Jewish Federation's Annual Campaign continues for future generations. The fund is created in your name at the Jewish Community Foundation and permanently endows your gift to the community. A LOJE is also a powerful statement of your commitment to tzedakah, providing a legacy for you, your family and your community.

How does it work?

You can create a Lion of Judah Endowment Fund with a minimum irrevocable gift of \$100,000 either during your lifetime or after your lifetime through your estate plan. The Jewish Community Foundation manages the fund, and the annual spendable portion of the fund is used to perpetuate your gift to the Annual Campaign. The gift can be made with many types of assets including cash, appreciated securities, real estate, life insurance, charitable trusts or gift annuities, retirement assets and donor advised fund recommendations.

What are the benefits?

- You may receive a charitable income tax deduction if you make a gift to establish a fund during your lifetime. If you make the gift through your estate plan, your estate may receive a charitable estate tax deduction.
- You continue your commitment to the Annual Campaign in perpetuity by providing a permanent source of funding for your gift.
- You invest in the future of the Jewish community by ensuring that the vital operating needs of the community are met in the future.
- You will be invited to sign the Book of Life, which is a collection of essays that record the personal histories, values and dreams of individuals who have made a commitment to establish an endowment or a bequest to the Jewish community.
- You set a powerful example for women today and in the future.

How can I fund a LOJE?

You have many options for funding a Lion of Judah Endowment. We can work with you and your financial advisor to choose the option that works best for you:

For more information:

Caren Goldberg
Executive Director, Jewish Community Foundation
CarenB@MilwaukeeJewish.org
414-390-5737

Amy Blumenthal
Director, Women's Philanthropy
AmyB@MilwaukeeJewish.org
414-390-5713