

What will your legacy be?



By naming JSSA as a beneficiary of your estate, donor-advised fund, life insurance policy, or retirement account, you make a lasting difference in your community's health and well-being. You may also accrue valuable tax benefits.

While a will covers the majority of your assets, you may have assets that you can use today to achieve impact in the community.

Choosing the right planned gift depends on your circumstances, financial goals, and dreams for the future.

We're here to help you create your JSSA legacy.
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Bequests

The simplest way to create your JSSA legacy is through naming JSSA in your will or living trust.

A sample of the customary language to ensure JSSA is included in your will is:

"I give to Jewish Social Service Agency, 200 Wood Hill Road, Rockville, MD 20850 (the sum of \$_____ or _____percent of the rest, residue and remainder of my estate/trust) for its general purposes."

All bequests are invested in JSSA's high-performing endowment. An annually allocated portion of the interest on the endowment helps support the services JSSA provides to neighbors in our care.

If you have named JSSA in your will or as a beneficiary of other assets, let us know so we can ensure your legacy is carried out as you intend. Please complete this form.

Beneficiary Designations

It is also easy to name JSSA as a beneficiary of other assets, such as retirement accounts, life insurance policies, or annuities. JSSA is a tax-exempt 501 (c) 3 organization so JSSA will receive the full amount of what you designate.

You can leave JSSA a specific amount or percentage of your IRA, life insurance policy, or other financial accounts. Make sure that your beneficiary designations are up-to-date and reflect your wishes.

Always consult with your financial advisor or tax attorney when making estate decisions.

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