Our Foundation uses Endowment Fund Agreements containing a Letter of Intent to coordinate all aspects of a donor’s legacy plan. This simple document (available both on our website and at our office) allows you to stipulate how your Fund will make distributions to charitable beneficiaries.

* You may name the Foundation itself as the beneficiary of the bequest, and the Foundation will distribute the flow of funds according to your Letter of Intention into perpetuity.
* You may change your charitable beneficiaries or the percentages given to each organization at any point during your lifetime by changing your Letter of Intention with the Foundation.
* You may choose the name of your Fund, using your family name or the name of a loved one.

Sample Bequest Language:

“I give **X**% of my (**ex. estate, IRA, life insurance policy etc**.) to the JEWISH COMMUNITY FOUNDATION of Orange County (TIN 95-3645825) to establish an Endowment Fund.”

or

“I give $**X** from my (**ex. estate, IRA, life insurance policy etc**.) to the JEWISH COMMUNITY FOUNDATION of Orange County (TIN 95-3645825) to establish an Endowment Fund.”