

PERPETUAL ANNUAL CAMPAIGN ENDOWMENT FUND

With a Perpetual Annual Campaign Endowment Fund (PACE), you can endow your gift to UJA Federation of Greater Toronto's Annual Campaign and guarantee future support for critical programs and services in the Jewish community.

AT-A-GLANCE

- Enables your UJA Federation Annual Campaign gift to be made in perpetuity
- Establishes a legacy to safeguard the values that have been so important to you during your lifetime
- Provides tax benefits for you or your estate
- May be created with a variety of assets

JEWISH
FOUNDATION
OF GREATER TORONTO



A Perpetual Annual Campaign Endowment Fund (PACE) at the Jewish Foundation of Greater Toronto is a permanent fund dedicated to ensuring that your UJA Federation Annual Campaign gift continues forever. A PACE fund is not intended to take the place of your annual gift. It is a lasting legacy for future generations.

A PACE fund can provide you with considerable tax benefits through a variety of vehicles which can best be determined after reviewing your financial and tax objectives with your financial advisor.

The amount required to endow your campaign gift is calculated by multiplying your annual gift by twenty. For example, if your annual campaign gift is \$5,000 the amount required to permanently endow is \$100,000. As an alternative you may endow a portion of your gift by establishing a PACE fund with a lesser amount and then build up the fund through subsequent contributions.

The Foundation administers the fund, writes all cheques and makes distributions in the fund's name or anonymously if you prefer. You are sent statements reflecting the income earned, distributions made and current balance of your fund.

THERE ARE SEVERAL WAYS TO FUND YOUR PACE:

- **Gifts of cash or assets** – With an outright gift of cash or appreciated assets like stocks or bonds.
- **Bequest** – A simple clause in your will is the most common technique for creating a PACE fund through a bequest.
- **Gifts of Life Insurance** – Appealing to donors due to its reasonable cost and tax benefits; by naming the Jewish Foundation of Greater Toronto owner and beneficiary, the donor is able to receive a tax receipt for the annual premiums.
- **Gifts of RRSPs or RRIFs** – Subject to high taxation when left in your estate, but ideal for transfer in whole or in part to create a fund to perpetuate your Annual Campaign gift.
- **Additional funding vehicles** are also available and the Jewish Foundation of Greater Toronto or your financial estate planner can help you select the option that best suits your philanthropic goals.

Please consult your tax or estate planning professional to determine what is best for you.

CALL 416-631-5703 TODAY

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