

HUC-JIR's New Website Dedicated to Planned Giving

The College-Institute has launched a feature-rich website to encourage donors to consider making *planned gifts*. The site is designed to help determine the most advantageous trust instrument with which a donor can support HUC-JIR while meeting his or her family's own financial needs and goals.

Many donors don't realize that it is possible to make a gift of transformational significance – the kind of contribution many friends of HUC-JIR would be happy to make if they thought they could. These are gifts that truly make a difference, that ensure a level of support magnifying our ability to fulfill our mission and allow donors to participate at levels much higher than they may think is possible.

Gifts of transformational significance often can be made at very low cost. It is simply a matter of planning what to give, how to give, and when to give.

There are numerous potential advantages to a planned gift. Some qualify for an immediate tax deduction, may increase spendable income, or provide significant future tax savings for the donor's family.

The site contains dozens of resources including:

- descriptions of various gift types and their benefits to donors and recipients;
- personal planning ideas;
- a glossary of terms;
- facts for financial advisors;
- best assets for giving;
- a gift designer worksheet that produces a side-by-side comparison of different types of trusts;
- a dynamic gift calculator that allows donors to explore different variables that can enhance their returns;
- a number of free publications; and
- examples of planned gifts that donors have made to HUC-JIR.

Assistance for making planned gifts is available at HUC-JIR's planned giving website.

The screenshot displays the HUC-JIR Planned Giving website interface. On the left is a vertical navigation menu with categories like 'News & Information', 'Planned Planning Ideas', 'Best Assets for Giving', 'Gifts That Fit Your Income', 'Gifts from Estate Plans', 'Donor Stories', 'Guidance & Recommendations', 'Estate Year Gifts', 'Estate Planning Lessons', 'Important News', 'Facts for Advisors', 'Resources & Downloads', 'Gift Calculator', 'Free Publications', 'Contact Us', 'Planned Giving Home', 'Hebrew Union College Home'. The main content area features a 'Planned Giving' header, a 'Donor Stories' section with a photo of Barbara and Norman Gross and a caption, and an 'Estate Planning Lessons' section with a photo of Gloria Asadi and a list of lessons including 'Your Estate Planning Document', 'Zionism a Powerful Gift', 'Asset Protection', 'Trusts for Family Security', and 'Leaving Your Mark on Tomorrow'.

HUC-JIR's Development staff is available to discuss planned giving options. Once donors have made the decision to make a gift, their next step is to discuss the gift with their own financial advisor – typically an attorney or accountant. The advisor is then put in touch with the College-Institute's trust attorney, and they will formalize the gift instrument.

HUC-JIR's Planned Giving website can be accessed at <http://www.huc.edu/plannedgiving>

Planned giving is a meaningful and effective way to help provide the financial sustainability that will secure HUC-JIR's academic excellence and fulfill its mission of preparing men and women of vision as leaders for the Reform Movement and the Jewish people worldwide.