



The “J”eneration Society לדור ודור

KAPLEN JCC on the Palisades

3 Steps to Making a Beneficiary Gift

Did you know that the beneficiary designation on a retirement plan or life insurance policy determines who will receive these funds, even if they are designated differently in your will? Did you also know that funds remaining in your IRA may be subject to multiple taxes if left to your heirs?

If you are considering including a gift to the Kaplen JCC on the Palisades we have a simple solution.

Name the Kaplen JCC on the Palisades as a beneficiary or partial beneficiary of your retirement plan and leave other less-taxed assets to your family.

All gifts can be designated for the organization or need most important to you.

IT'S EASY AS 1, 2, 3!

- 1** Request a “change of beneficiary” form from your plan administrator.
- 2** List us as the beneficiary at the following address:
Kaplen JCC on the Palisades
411 East Clinton Avenue
Tenafly, NJ 07670
- 3** Inform us of your intentions so we can thank you!

The content here is general in nature and intended to be used for informational purposes only. It should not be relied upon as legal, tax, accounting or other professional advice. To determine how a estate planning decision might affect your particular circumstances, it is expressly recommended that you consult an attorney, financial advisor or other qualified professional.

