

# L'Dor V'Dor

## Growing Our Community

At Temple Beth Tikvah, our passion for Judaism and community grows stronger with each new season. Providing a welcoming and inspiring environment for learning, worship and fellowship doesn't happen by accident. It takes a committed congregation that is prepared to meet the financial demands of operating a dynamic synagogue today and into the future.

Since annual Nadiv Lev commitments alone are not enough to sustain our programs and services, we continually seek other ways to fill the gap. Planned giving, a special covenant with the next generation, is one of the ways we can meet these demands. That is why we have created the Temple Beth Tikvah L'Dor V'Dor Legacy Society, which recognizes generous members of the TBT family who have taken steps to support the synagogue through a planned gift.



9955 Coleman Road  
Roswell, Georgia 30075

**770-642-0434**

[www.bethtikvah.com](http://www.bethtikvah.com)



*L'Dor V'Dor*  
*Legacy Society*  
temple beth tikvah

# Generation to generation

While current demands on your finances could prevent you from making a significant gift to the synagogue today, the Temple Beth Tikvah L'Dor V'Dor Legacy Society can be an important part of a planned gift strategy that benefits your family and the congregation that you love at some point in the future.

Planned gifts can take many forms, including:

- **Deferring a gift of cash, property or part of your estate** until after your lifetime or your spouse's lifetime. These gifts are fully exempt from estate tax.
- **Making a revocable gift** by naming TBT as the beneficiary of assets in a living trust for your lifetime. You maintain full control of the trust terms during your lifetime.
- **Naming TBT as the beneficiary** of IRA or qualified employee retirement plan assets. This approach avoids the potential double taxation of these assets, and can be used as part of an income tax minimization strategy.
- **Directing annual IRA or qualified retirement savings plan** required minimum distributions (RMDs) to TBT. This is a great way to minimize taxes on income you do not currently need.
- **Donating a home or other property to TBT.** You'll enjoy a tax deduction while helping your heirs to avoid potential capital gains taxes.

• **Establishing a charitable remainder unitrust.** You will enjoy tax benefits, a hedge against inflation, and variable income during your lifetime, and provide a meaningful gift to TBT upon your death.

• **Establishing a charitable reminder trust or charitable gift annuity** that benefits TBT. These approaches can provide you with an immediate tax benefit as well as lifetime income at a favorable rate of return.

## Learn More about Planned Giving through the L'Dor V'Dor Legacy Society

If you would like to learn more about how planned giving works and whether it is an appropriate tool for you, please contact Andy Zalkin, TBT Fundraising Chair, at 404-840-1022 or the TBT office at 770-642-0434.



## TBT L'Dor V'Dor Legacy Society

I/we already qualify for membership in the L'DOR V'DOR LEGACY SOCIETY. I have made the following arrangements for TBT in my estate plans:

I/we have included TBT in my/our will or trust.

I/we have made other estate provisions for TBT. (i.e.: beneficiary of IRA, insurance policy etc.)

Please specify: \_\_\_\_\_

Yes! I am interested in becoming a member of the TBT L'DOR V'DOR LEGACY SOCIETY.

Please contact me to talk about planned giving opportunities.

I/we will contact my/our attorney, financial planner and/or insurance agent about including TBT in my/our estate plan. S/he will be contacting the office at TBT.

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Please send this completed form to:  
Andy Zalkin, Fundraising Chair, Temple Beth Tikvah  
9955 Coleman Road, Roswell, Georgia 30075

Information provided is strictly confidential and places you under no obligation.