



## IMPACT: LEAVING A LEGACY

Paul and his wife Pam don't need a football field named after them, or even a plaque on a park bench.

They're not looking for fame or notoriety for their legacy gift—they just want people to know that if they can leave a gift, you can too.

“I don't believe in giving anonymously,” says Paul Bernstein. “Give with your name because it inspires others.”

Pam and Paul recently left a legacy gift to the Minneapolis Jewish Federation (Federation), a meaningful gift for them.

“Anyone can leave a legacy gift of any size, based on what is meaningful to them,” explains Alene G. Sussman, Executive Director of the Foundation.

A legacy gift is defined as a planned future gift that designates some part of an individual's estate as a donation to a nonprofit. There are many ways to leave a legacy gift—of any size—in your estate plan:

- designating the Federation as a beneficiary of your retirement account or life insurance policy,
- leaving the remainder of a donor-advised fund to the Federation or the Minnesota Jewish Community Foundation (Foundation),
- contributing a one-time gift to the Federation or Foundation's general endowment fund, or
- creating an endowment fund that will keep providing annual donations to the Federation's annual campaign.



The Bernsteins consider themselves middle class, a group that may not always see themselves as people who can leave legacy gifts. “When people think about who is leaving gifts to charity, they often think of those who are very wealthy,” says Paul, “but it's absolutely relevant to those who think of themselves as middle class.”

It is also easy to do, as Alene explains, “Foundation or Federation staff can work with you to set up the gift and ensure your goals for the gift, whether designating it as an unrestricted gift or for a special purpose, are put into place. In most cases this can be done without professional advisors, but if desired, Foundation or Federation staff

can partner with them to get plans in place.”

Federation was a natural choice for Pam and Paul’s legacy gift. Paul recognizes that Federation has had an effect on his family since he was a child: when he was five, his family lost their house in a fire.

“We were lucky enough to get out,” says Paul, “but we lost just about everything we owned. As a kid you don’t really understand it that well, but I do remember that Federation partner agency Jewish Family and Children’s Service helped us rebuild our lives. And I can tell you later that the Federation helped my family send my sister and me to Talmud Torah.”

The help profoundly affected the Bernstein family’s approach to giving back. When Paul was a teenager, his father brought him along to Federation phone-a-thons.

“I wasn’t particularly good at calling people,” Paul laughs. But with his dad’s help, he realized that fundraising was a science. “I remember my dad saying there are different approaches for different types of people. I’ve always thought that was fascinating. And,” he says, smiling, “now I’m in sales.”

As Paul raised his own family, he and his wife, Pam, continued to seek connection within the Jewish communities in which they lived, including Paul holding campaign leadership positions with the Jewish Federations in Chicago and in the San Francisco area. They acknowledge the role Federation has played in their lives—including subsidizing the cost of sending their son and daughter to Herzl Camp.

“Pam and I both believe very strongly in the value of Jewish community,” says Paul. “With our legacy gift, we wanted to take part of what we’ve been able to accumulate and leave it for the community. We hope the value of the gift enables Federation to continue to do its great work. We also hope the action of the gift will inspire others to do the same thing.”

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**Leaving a legacy gift is an important decision and an easy process.**

Paul and Pam sat down with their finances and a list of organizations and causes that were important to them, and planned their estate. They worked with Federation staff to put their gift into writing according to their wishes.

To start a conversation about your legacy gift, please contact the Minnesota Jewish Community Foundation at [info@mnjcf.org](mailto:info@mnjcf.org) or 952.417.2316.