



# Women's International Zionist Organization **LEGACY GIVING**



**WIZO**  
Doing What  
Matters

Create a lasting and meaningful legacy. Impact the world beyond your lifetime. All while meeting your personal, financial and philanthropic goals, through **WIZO Legacy Giving**.

Since 1920, WIZO has touched the lives of more than 4 million Israelis in need. Founded by women for women, WIZO has become a powerful agent of change for **infants, children, youth, women and the elderly.**

WIZO Legacy Giving can help provide:



Potentially lower estate and income taxes



Generational wealth transfer on a tax-advantaged basis



A lasting gift to the people and country you love

# WIZO Legacy Giving options

Your estate has three possible beneficiaries: Your family, your favorite charity, or the IRS. With proper planning, YOU can pick two.

## Bequest

- A bequest is a gift you leave in your will or trust to a person or charitable organization.
- Bequests may include cash, stocks, works of art, etc.

## Charitable Lead Trust (CLT)

- A CLT is a trust designed to provide financial support to a charity for a specified period of years by donating an asset or portion of an asset. The income is distributed to the charity for a term of years, with the remaining assets eventually passing tax free to family members. A CLT:
- Is useful in reducing wealth transfer taxes such as gift and estate taxes by passing appreciating assets to family, while making interim charitable gifts.
- May provide the benefactor with a large tax deduction for the initial funding of the trust.
- Allows regular charitable giving with minimal effort.

## Charitable Remainder Trust (CRT)

- A CRT is a trust that lets you donate assets to charity and draw annual income for life, or for a specified period of years, then donates the remainder asset to the charity. A CRT:
- Provides the benefactor with a large immediate tax deduction.
- Allows assets to be sold with no capital gains tax inside the CRT.

## Life Legacy Program

- You can contribute a larger amount to WIZO than you may otherwise have thought possible with a gift of a life insurance policy.
- An income tax-deductible contribution is made to WIZO, which is used to purchase a life insurance policy with WIZO as the beneficiary. The Life Legacy Program:

- Provides for a tax deduction for every annual contribution.
- Allows contributions to be tailored to your unique goals and objectives.
- Provides an exponentially greater valued gift to the charity.

**For more on WIZO Legacy Giving, contact: Women's International Zionist Organization  
Planned Giving Team  
950 Third Ave., Suite 2803  
New York, New York 10022  
212.751.6461 [WizoUSA.org](http://WizoUSA.org)**



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**Please consider a WIZO Life Legacy gift.**

Your generosity and planned gift using one or more philanthropic strategies can be exponentially more impactful than that of a traditional charitable contribution.

What you do next matters . . . to you, your family, and to Israel through the immeasurable difference WIZO can make with your GIFT of a LIFETIME to reinforce your family's LEGACY.

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