



# Legacy and In-Memory Giving

Jersey Community Foundation (JCF) is an independent charity that delivers effective philanthropy based on local need. We work with individuals, families, businesses and trusts who want to make a real and lasting difference to their local community in a way that works best for them.

We ensure the funds that you donate are properly used, secure and strategically invested in line with your wishes.

Our long-term and data-driven approach makes JCF a reliable place to leave a lasting, charitable legacy that will benefit the community for years to come.

## Building Your Legacy



**At JCF, we understand that the decision to leave a legacy is a big one. That's why we ensure every penny you give goes as far as possible.**

By offering a bespoke tailored service to individuals we can work with you or your loved ones to ensure your wishes are fulfilled. Leaving a gift in your will is a great way to create a legacy of your generosity and give back to the community that has been a significant part of your life.

Many individuals generously include a gift to their local community foundation in their will, sometimes alongside a living gift. Such gifts are essential fuel for our beneficial work in our Island community, both now and in future.



## What is legacy giving?

Legacy gifts are a way to support the causes you love, help your community for generations to come and create a lasting memory of your generosity.

Legacy giving is when an individual includes one or more charitable organisations or causes in their will to receive a portion of their assets, finances or property after they die. It's a method used to ensure a meaningful contribution to, and lasting impact on, causes that individuals care about such as charities, educational institutions or research organisations, after their lifetime.

You may choose to ask the Foundation to allocate your gift to one of our **existing themed funds**. Alternatively, you may decide to **create a named fund** to support your own particular charitable interests as well as ensuring your name lives on in the future. If you wish, this option allows your family to have input on how the funds are distributed too.

Whichever route you choose, by using the JCF to help you manage your legacy you can be confident that the money you leave will always be used wisely.

## Your legacy gift can:

- support causes you are most interested in or concerned about, or be allocated to the Island's most pressing current needs (using our in-depth community knowledge and connections), depending on your preference;
- be small or large, as a percentage of your Estate or a fixed sum gift;
- be distributed to local causes quickly and/or invested in an endowment fund with the
- income used for grant-making to local causes year-on-year, in perpetuity, in both cases through our well-established channels and procedures;
- involve setting up a Personal Named Fund, potentially with a living gift (enabling you to see the immediate impact) alongside a legacy gift;
- be allocated to one or more of our existing themed funds, allowing JCF to respond to
- urgent community needs and to emerging opportunities for projects, programmes and services across a broad range of charitable organisations; and,
- make a tangible difference: we allocate your gift to specific causes, guided by your expressed preferences, and ensure these are as impactful as possible.

**Along with your solicitor or another professional adviser, we can support you in reviewing the above options and making the choices you are happiest with.**

## Remembering a loved one

**Many people wish to remember a colleague or loved one by setting up a charitable fund in their name to support good causes. The JCF can help establish a Memorial Fund, in commemoration of a loved one, providing family and friends with a personal focus for special memories.**

A memory fund enables you to create a lasting legacy for your loved one, tailoring the fund themes and criteria to best represent causes close to their heart.

Benefits of a JCF memorial fund:

- A Memorial Fund can be set up in a matter of days
- You can raise funds and collect donations into a single fund that can support a wide range of charities, community groups and organisations
- We can offer advice on how to make your donation tax efficient

**To find out more about leaving a legacy with JCF, contact our CEO, Anna Terry: [anna@jerseycommunityfoundation.org](mailto:anna@jerseycommunityfoundation.org)**



## Why set up a Legacy Fund

When considering legacy giving, it's worth noting that while specific local charities may evolve over time, community foundations offer enduring relevance by supporting a range of charities and causes that consistently align with the ever-changing and evolving needs within a community.

Contributing to JCF empowers individuals to make a broader impact across various needs within our Island community - from education to the environment, science to sport, and poverty to public health (and everything in between). This inclusive approach promotes unity and collaboration among charitable organisations, as well as strength and resilience in Jersey, amplifying the overall positive effect on our Island community.