3 Steps to Making a Beneficiary Gift

Did you know that the beneficiaries named on a retirement plan or life insurance policy determine 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 estate?

If you are considering including a gift for ADI in your will, we have a simple solution. Name ADI as a beneficiary or partial beneficiary of your retirement plan and leave other less-taxed assets to your family.

It's Easy as 1, 2, 3!

1. Request a "change of beneficiary" form from your plan administrator.

2. List ADI as beneficiary at the following address:

ADI Israel Foundation

1416 E 7TH ST

BROOKLYN, NY 11230-5711

3. Let us know so we can thank you!

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