The Connection Continues with a UJIA Legacy Gift
Israel holds a central part in our lives. We have a responsibility to those who built the State to continue to support and strengthen it in the future.

By leaving a legacy gift through UJIA each of us can honour the generations of the past and create a lasting imprint for those of the future.

Remembering UJIA in your will, will improve the lives of children and young adults both in Israel and here in the UK. Long into the future, your impact will be felt on people who, in many cases, are not even born yet. However, when you include UJIA in your will, the effect will also be felt a lot closer to home.

For you, the donor, it is an incredible feeling to know that the values and ideals that you have held so dear throughout your life will be continued in your name in the future. The causes that mean so much to you in your lifetime will continue to benefit from your generosity in a way that keeps your memory alive. In every sense, a legacy is the most inspirational of gifts.

By leaving a legacy in your will, you are not only reaffirming the value of charity - tzedakah - that you have actioned throughout your life, you are making these acts of kindness part of your eternal memory.

Leaving a legacy to UJIA will create a connection between you and the people of Israel that will last forever.

During his lifetime, Gerald Crossman scaled the heights of the music world, playing alongside showbiz greats including Charlie Chaplin, Morecambe & Wise and even Marlene Dietrich. Yet it was after his death that he made perhaps his most life-changing impact. Gerald left a legacy gift to UJIA, used to support young children living on Israel’s periphery. The donation enabled children like Guy at Carmiel Children’s Village, to have a new start, away from a life of abuse and poverty. This opportunity would not have been possible were it not for the generosity of Gerald Crossman. When Nina Padwick looks back on her life, some of her most treasured memories occurred in Israel. Her personal connection with the country is something she is keen to secure long into the future. Children and teenagers are important to Nina, which is why she has earmarked her legacy gift to support Israel’s underprivileged teenagers. People like Agam, who benefit from mentoring through the UJIA Youth Futures project. Through her legacy gift, Nina will change the lives of those who represent her hopes and dreams for the future, in a meaningful and enduring way.
For nearly 100 years UJIA has been building meaningful connections between the UK Jewish community and the people of Israel.

Generation after generation of UK Jewry has benefited from UJIA programmes that nurture lifelong connections to Israel, whilst in Israel itself, our educational and welfare initiatives impact tens of thousands of lives each year.

In Israel, UJIA invests to address inequalities in society and to advance education and employment opportunities in the Galil, Israel’s Northern-most region comprising diverse communities, living in Israel’s geographic and socio-economic periphery. We work closely with the Ministry of Education and various partners to improve educational infrastructure, enhance primary and secondary education, and support residents of the Galil to enter higher education and employment.

UJIA projects are designed to promote a socially-cohesive Israel for its Jewish and non-Jewish citizens and to bridge socioeconomic gaps, so that all communities can live in stability and prosperity.

UJIA’s vision is also of a strong British Jewry with a lifelong commitment to Israel. In order to achieve this, we deliver and support high quality informal educational programmes across the UK to enhance knowledge about Israel from childhood to adulthood and we provide programmes across the UK that place experiential learning at their core, encouraging participants to explore their identities and improve their knowledge of Israel’s history, culture and society. Our educators design and deliver outstanding programmes so that participants develop secure, meaningful relationships with Israel, and learn to appreciate modern day Israel’s nuance and complexity.

We harness our projects in the Galil to provide British Jews with unique, enriching opportunities to experience the real Israel and see first-hand the benefits of a strong bond between the British Jewish community and the people of Israel.

Through the work of UJIA in Israel and the UK, your legacy will make an impact long into the future.
LEAVING A LEGACY, PLANNING FOR THE FUTURE

Writing a will and leaving a legacy gift to a charity are effective ways of allowing both you and your chosen cause to plan for the future.

Up to two-thirds of us never get around to making a will, and yet it is one of the most important documents, affecting the lives and financial wellbeing of those that are dear to us. Unfortunately, the assets of anyone who dies without a will are subject to the law of Intestacy, arcane rules that will artificially distribute your estate in a way you might not intend.

Only by making a valid will, and keeping it under regular review, can you avoid the artificial division of your estate and ensure that your assets will be divided between family, friends and charities in the way you choose.

The most logical time for your first will is when you marry or have children or have assets that you need to consider how to distribute. Just as it is important to make a will, so is it important to make sure that, as circumstances change, the will is reviewed so that it remains up-to-date.

As UJIA looks to connect more and more young people in the UK with people and projects in Israel and in the ongoing mission to increase social mobility and cohesion in Israel, legacy gifts will play a significant role in bringing new initiatives to fruition.

Your commitment of a legacy of any value allows us to plan for the future and ensure the very best for the next generation too.

After many holidays in Israel, Ted & Sylvia Newton became aware of a side to the country that is far removed from the sun and sea. An Israel that needed their support.

A legacy gift that would help teenagers achieve their academic potential appealed to the couple and this was made even more appealing when they realised the significant tax benefits available to them when leaving legacy gifts in their wills. Now, Mimi and her friends at the UJIA supported Western Galilee College will benefit not just from Ted & Sylvia, but from the taxman too.

When Simon Winston BEM was hiding in a pigsty in Poland in 1944 he would not have believed that just a decade later he would be visiting Israel for the first time. Today, as he reflects on his personal journey and dreams for the future, Simon wants to ensure that young people in the UK have the same opportunities to visit Israel that inspired him all those years ago. That is why Simon would like his legacy gift to support the UJIA bursary fund, that enables British teenagers to participate in an Israel Tour.

As Simon is a Holocaust survivor with no close family, UJIA’s Legacy team provide much needed assistance and, as executors of his estate, UJIA has worked closely with Simon, assisting him in every part of the process.
In Harvey Bratt and his colleagues, UJIA has the most experienced and knowledgeable legacy team in the Jewish community.

Their expertise ranges across the various disciplines required to ensure your legacy is carried out exactly as you want it. Estate administration, tax planning and where necessary helping you find the right solicitor to draft your will, are all part of the service provided. But more than this, it is the human touch that sets the UJIA legacy team apart.

Harvey and his team will guide you through the various decisions that need to be made, ensuring that every last detail is considered and taken care of. This could include provision for children, plans for your burial (in the UK or in Israel) or the appointment of trustees or guardians. They will also talk you through the various types of legacy - specific, fixed and residuary. Specific legacies are named items (eg an item of jewellery, a property, a work of art). A fixed legacy is a fixed sum of money which does not change. Residue is what’s left when specific and fixed legacies have been paid/distributed. It can be divided into shares or percentages, giving maximum flexibility in dividing residue between family, friends and charities, in equal or unequal shares.

The drawing up of a will is a hugely important process. That is why UJIA work with reputable solicitors’ firms who you can trust to provide a professional service.

For many, a legacy is not only an expression of their financial wishes but their Jewish values too. At UJIA we understand how important this aspect is and our sensitivities around issues such as burial, kaddish and many other lifecycle events are what sets us apart. A legacy is more than a donation, it is the culmination of a process that is personal to you and sensitively handled by us.

I understand how big a decision this is for you and your family.

I regard it as especially important that our Legacy and Planned Giving Department lives up to the three key tenets which our donors are entitled to expect: professionalism, confidentiality and understanding. As Director of Legacies & Planned Giving and a qualified solicitor with over 30 years’ experience, I am proud of the legacy team. We would be delighted to guide you on any issues concerning your legacy, executorship or the administration of your estate.

To find out more about how your legacy can create a connection for the future of UK Jewry and the people of Israel, please give me a call on 020 7424 6431 or email harvey.bratt@ujia.org

Why should I remember a charity in my will?

A gift to a charity is not only an incredible legacy to leave, it is also exceptionally tax efficient. Charity legacies now cost your loved ones just a fraction of the amount you leave resulting from a reduced rate of Inheritance Tax (36% instead of 40%) where at least 10% of the estate passes to charity.

Let’s have a look at an example. Say there is a taxable estate of £1 million (that is after deducting the Inheritance Tax free allowances passing to family after the death of a single person or married couple).

Look at the following two scenarios here

In Scenario A, with no charity legacy, the full taxable estate is charged at the higher rate of tax, 40%. In Scenario B, the donor has left £100,000 to charity, but it has only depleted the family’s legacy by £24,000. Effectively the taxman has picked up the other £76,000.
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