



**When was the last time you looked at your Will?  
Do you have a Will? During COVID 19,  
it might be time to reevaluate your plans.**

Take the necessary steps to update your estate plan so it meets your current goals.

The following checklist can help you prepare, care for others, and manage the distribution of your assets.

- Review your will, checking for updates that may need to be made because of a change in your life or a beneficiary's. Also, consider the impact of any tax law changes.
- Check that the executor or personal representative you've named is still the qualified individual you want to manage your estate, resolve claims, minimize taxes, and distribute the designated portions to your beneficiaries.
- Be sure you are comfortable with the guardian named in your will for those under your care. If your dependents were minor children who are now grown, does a guardian still need to be listed?
- Look over beneficiaries designated for your insurance and retirement plans to make sure you haven't named a deceased loved one or a former spouse.
- Make sure the titles for your assets reflect your current circumstances and wishes, so they go to the people and organizations you intend.

- Implement a plan that minimizes taxes. One possible solution is to leave a charitable gift to one or more of your favorite charities, like **Denver Jewish Day School**.
- Include a health care power of attorney to guide your family and health care providers when you are unable to make decisions for yourself.

## MINIMIZE TAXES TO YOUR HEIRS

There are a number of tax benefits when you use your estate plan to support non-profits like **Denver Jewish Day School**, thereby furthering the mission of the school. Such measures can minimize taxes for your heirs. Work with your estate planning attorney or tax advisor to make your plans or implement any updates. If you would like a list of estate planning attorneys to interview, please contact Krista Boscoe, Director of Advancement, [kboscoe@denverjds.org](mailto:kboscoe@denverjds.org), 303-919-0812.

Along with twenty-five other local Jewish agencies, **Denver Jewish Day School** is participating in Rose Community Foundation's Live On - Life & Legacy program to grow endowments. Please visit [denverjds.org/giving/ways-to-give/legacy-society](http://denverjds.org/giving/ways-to-give/legacy-society) for more information.

*The school's legal name is Denver Jewish Day School, 2450 S. Wabash St., Denver, CO 80231. The EIN number is 84-1476467.*

Information contained herein is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.



**LIVE ON**  
BUILD YOUR JEWISH LEGACY  
An initiative of **ROSE** COMMUNITY FOUNDATION

