



Funding Our **FUTURE**

Derech L'atid – Path to Our Future

**Creating a long-lasting legacy that will have a positive impact
on future generations**

do -Interpretation from Talmud Taanit 23a



CNS 150 – A CALL TO ACTION TO FUND OUR FUTURE

BACKGROUND

Throughout its long and distinguished history, Congregation Neveh Shalom has served as a place to gather, to worship, to be inspired, and to seek answers through study while nurturing a strong commitment to a just and better world. We have inherited the spiritual and social foundations created by preceding generations. Our legacy, indeed our responsibility, is to take what we know and pass it on to our children and grandchildren.

WHAT

Congregation Neveh Shalom is deeply engaged in this sacred work through numerous programs of youth, family and adult education, community support, social action, and outreach to interfaith families and LGBTQ community members. In order to continue offering our diverse and prolific array of programming, and maintain our top notch clergy and staff, we must make provisions for our future.

We ask that you consider making a gift to Congregation Neveh Shalom to guarantee our Jewish future. The time is now; the need is great. As our predecessors made a path for us, so too shall we do for the next generation. ***The goal is to raise \$8 million – \$4 million for capital investment, \$4 million for endowment.***

WHY

Funding Our Future through fiscal strength has never been more critical. We as a community face some challenges, but these challenges also present an opportunity to re-imagine and re-invent our fiscal status and framework to help ensure a community for the next 150 years. Our campus needs to be an appreciating asset that works to sustain us rather than requiring to be sustained. By eliminating financial obligations, improving a well-functioning, secure campus and building a strong endowment, we can continue to provide excellent clergy, staff, and comprehensive programs to our thriving community for the next 150 years.

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CAMPAIGN GOAL – \$8 MILLION

Capital Investment:	\$4,000,000
• Debt Elimination (burning our mortgage)	\$1,500,000
• Campus Security (building hardening / hardware)	\$ 180,000
• Deferred Maintenance / Necessary Projects	
○ Parking Lot	\$ 140,000
○ Kitchen	\$ 100,000
○ Roofs	\$ 160,000
○ Boiler / HVAC	\$ 100,000
○ Foundation School (classrooms / playground)	\$ 120,000
○ Technology / Communications	\$ 60,000
○ Plumbing System	\$ 70,000
○ Houses (Stampfer / Rental)	\$ 400,000
○ Hillside Stabilization	\$ 90,000
○ Courtyard / Plaza	\$ 40,000
○ Windows	\$ 40,000
• Building Reserve Fund	\$1,000,000
Endowment:	\$4,000,000
Total:	\$8,000,000

There Are Many Ways to Make a Personal Gift

Multi-year pledges: To increase your contribution to CNS's comprehensive campaign, you may make a pledge now and spread payment of your gift – and tax deductions – over as much as three years. (For quarterly or annual payment schedules, please see the next section.)

Corporate, foundation, and family matches: Many corporations and foundations offer matching programs. Such programs may allow donors to double or triple the amount of their contribution, especially if the match is obtained each year of the pledge period. Please consult your benefits coordinator or human resources manager. If no formal matching program is established, ask your employer – your gift may be matched anyway. Individual families may also structure innovative “family” matches to involve everyone in creating a significant contribution to a capital campaign.

Appreciated stocks, bonds, mutual funds and property: An alternative to cash are gifts of appreciated property, such as securities. In many (if not most) situations, the full, fair market value of gifts of appreciated property is deductible. Additionally, taxes on capital gains are often avoided.

Example: a donor owns a stock currently valued at \$50,000 which she purchased years ago for \$120. Because the capital gains tax is 15%, the gift of securities produces a \$50,000 charitable tax deduction that saves her \$10,000 in income tax. In addition, she avoids capital-gains tax on the \$49,880 of “paper” profit, which saves an additional \$9,976. The net cost of the \$50,000 gift is only \$30,024 (\$50,000 less \$10,000 less \$9,976).

The net cost of your gift depends on several variables. There is a limit on the total amount of a gift that can be deducted in one year. A donor with an income of \$100,000 can deduct \$30,000 in one year for gifts to charities like CNS. The extra amount of the gift can be deducted over as many as the following five years.

As always, the particular tax savings depend on individual circumstances and must be discussed with personal financial and tax advisors.

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There Are Many Ways to Make a Personal Gift

Planned gifts: Deferred or planned gift options (such as a bequest) often help donors see how they can make a maximum gift to an organization or campaign. The commitment to give is made now, but the gift does not effectively come into the possession of CNS until a future date. Advantages to donors of such gifts can include reduction in estate, capital gains, gift, and/or income taxes. *Gifts of this nature can be accepted toward the campaign education endowment goal, but not toward the more immediate land acquisition goal. Whether counted toward the campaign or not, bequests and other legacy gifts are incredibly valuable for long-term stewardship and sustainability and we welcome the opportunity to share more information with you.* Please contact Fred Rothstein for further information.

Additional options: Fred Rothstein, (503) 246-8831 ext 134, would be happy to provide further confidential information as you formulate your pledge to CNS's comprehensive campaign. We also recommend that you consult with your own financial and tax advisors as part of maximizing and finalizing your campaign gift plans.

Donor Recognition Opportunities

Memorial and Named Dedication Opportunities

Opportunity	Explanation	Giving level
Administrative wing	Plaque near principal entrance	\$750,000
CNS Social Hall, downstairs	Currently named "Birnbach"	\$500,000
Admin Building Lobby, Reception Area	Plaque in lobby & entry area, administrative wing	\$360,000
Foundation School Wing, downstairs	Plaque in Foundation School wing, downstairs	\$360,000
CNS Kitchen	Plaque near kitchen area, downstairs	\$250,000
Ark within Stampfer Chapel	Plaque for ark	\$180,000
Caretaker Residences (Ahavai Shalom and Neveh Zedek Cemeteries)	Separate listings for caretaker residences in each of our cemeteries.	\$150,000 each
Ark in Zidell Chapel	Dedication of ark in Zidell Chapel	\$118,000
Office – Assistant Rabbi	Plaque near Assistant Rabbi's office	\$50,000
Office – Rabbi Emeritus (2)	(2) plaques for Rabbi Emeritus offices -Rabbi Stampfer & Rabbi Isaak	\$50,000 each
Office – Cantor	Plaque near Cantor's office	\$50,000
Security System	Dedication Plaque in Admin Lobby	\$50,000
Stampfer Chapel Chairs	Dedication plaque in Stampfer Chapel	\$36,000
Offices – Staff (7)	(7) plaques for congregational staff offices. Remaining: 6, Dedicated: 1	\$36,000 each

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Donor Recognition Opportunities

Memorial and Named Dedication Opportunities

Classrooms—Religious School upstairs rooms (14)	(14) plaques upstairs near classrooms within our schools. Remaining: 11, Dedicated: 3	\$36,000 each
Zidell Chapel Chairs	Dedication plaque in Zidell Chapel	\$36,000
Technology	Dedication Plaque in Admin Lobby	\$36,000
Classrooms—Foundation School, downstairs (14)	(14) plaques for classrooms, downstairs. Remaining: 12, Dedicated: 2	\$25,000 each
Staff Workroom	Plaque for staff workroom	\$25,000
Main Sanctuary Pulpit	Dedication plaque in Main Sanctuary	\$25,000
Stampfer Chapel Pulpit	Dedication plaque in Stampfer Chapel	\$25,000
Zidell Chapel Pulpit	Dedication plaque in Zidell Chapel	\$25,000
Furnishings, classrooms (26)	Plaques for furnishings in each of the 26 classrooms (upstairs/downstairs)	\$18,000 each
Sanctuary seating (20)	Plaques for pews in the main sanctuary Remaining: 15, Dedicated: 5	\$18,000 each
Sukkah	Plaque for the Sukkah which will be erected each year in the upper entry plaza	\$10,000

Donor Board Levels

Malachim ~ Angels	\$500,000 and above
Tzadikim ~ Righteous	\$180,000-\$499,999
Shomrim ~ Guardians	\$100,000-\$179,999
Bonim ~ Builders	\$50,000-\$99,999
Parnasim ~ Leaders	\$18,000-\$49,999
Amudim ~ Pillars	\$10,000-\$17,999
Tormim ~ Patrons	\$1,800-\$9,999
Chaverim ~ Friends	up to \$1,799

We will work with families who wish to make significant combined gifts to arrange appropriate recognition at that level.

All contributions of any amount will be acknowledged in a campaign commemorative booklet that will be published on the successful completion of our campaign.

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Schedule for Three-Year Pledges

Gift Level	Yearly Payments/ 3 Years	12 Quarterly Payments	36 Monthly Payments
\$500,000	\$166,666	\$41,666	\$13,888
\$250,000	\$83,333	\$20,833	\$6,944
\$100,000	\$33,333	\$8,333	\$2,778
\$50,000	\$16,667	\$4,167	\$1,389
\$25,000	\$8,333	\$2,083	\$694
\$10,000	\$3,333	\$833	\$278
\$5,000	\$1,667	\$417	\$139
\$3,600	\$1,200	\$300	\$100
\$1,800	\$600	\$150	\$50

Pledge Form

In support of the Congregation Neveh Shalom Capital Campaign fund and in consideration of the mutual promises and gifts of others, and of the expenditures, commitments and services of Congregation Neveh Shalom, I/we _____ **the undersigned donor(s), enter into this Commitment Agreement to contribute to Congregation Neveh Shalom, Portland, Oregon, the sum of \$_____ over a period of (one, two, three) years commencing on _____(date).** I/We understand that this Agreement shall be interpreted under the laws of the State of Oregon and that this contribution obligation is legally binding on me/us and my/our heirs, successors and assigns.

This gift is made in the belief that the work of Congregation Neveh Shalom is essential as one of the pillars of the future of Portland's Jewish community.

Donor Information:

Name: _____

Address: _____

City: _____

State: _____ Zip: _____

Phone: _____

Email: _____

Please keep this gift anonymous

Listing:

In memory of: _____

In honor of: _____

Gift Method:

Outright by _____

Yearly Payments of \$_____ each year by December 31 for ____ years (3 maximum)

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Pledge Form

Payment Method:

Please make checks, corporate matches, and stock transfers payable to CNS

- Cash/Check
- VISA or MasterCard:

Account #: _____ Expiration Date: ____/____/____ CVS: _____

Signature: _____

- Electronic Transfer
- Online: <https://nevehshalom.org/capital-campaign/>
- Stock

Matching Gift:

This gift will be matched by my employer: _____

I/we understand that this agreement is intended to be binding and enforceable against me/us and my/our estate, heirs, successors and assigns.

Donor Signature(s) Date ____/____/____

Donor Signature(s) Date ____/____/____

Fred Rothstein Date ____/____/____

Thank you for your generosity!

CNS is a 501c3 organization. Our tax ID # is 93-0505089. This gift may be tax-deductible. Please contact your financial professional before making a gift or pledge.

The donor agrees to allow CNS to recognize this gift in publications and at events unless anonymity is specified.

Funding Our Future is our opportunity to ensure Congregation Neveh Shalom's
fiscal sustainability for generations to come.

Legacy Commitment Form

In keeping with Jewish tradition, I/we wish to share my/our blessings with others. Therefore, I/we make this Legacy Commitment to help provide for the Jewish community of tomorrow.

___ I/we intend to create a Jewish Legacy or I/we have already done so but haven't shared the information with you.

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

___ I/we wish to be recognized in the Legacy Society as follows: _____

___ I/we wish to remain anonymous.

Type of planned gift:

- | | |
|--|--|
| <input type="checkbox"/> Bequest in my/our will | <input type="checkbox"/> Life insurance policy/beneficiary thereof |
| <input type="checkbox"/> Beneficiary of IRA/other retirement plan | <input type="checkbox"/> Charitable remainder trust |
| <input type="checkbox"/> Gift of real estate/securities/other property | <input type="checkbox"/> Donor advised fund |
| <input type="checkbox"/> Charitable gift annuity | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> I wish to sit with someone and learn about my options | |

Purpose of the Gift:

___ Unrestricted gift to provide maximum flexibility to Congregation Neveh Shalom and its Board of Directors to direct funds to where the need is greatest.

___ Restricted to a specific purpose: (please identify) _____

Please provide any other details you wish to share (including amount of bequest and attach the relevant portion of the instrument): _____

(All information is kept in the strictest confidence and used for internal planning purposes only.)

By: _____

Date: _____

Please return this form and any attachments to: Congregation Neveh Shalom, 2900 SW Peaceful Lane Portland, OR 97209 Attn: Fred Rothstein, Executive Director. Completion of this form is a notification of intent only and is not legally binding. Please discuss your planned giving intentions with your professional financial and legal advisors. Congregation Neveh Shalom is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Tax Identification #93-0505089.



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 CONGREGATION
NEVEH SHALOM