

Insert your logo here

Legacy Gift Confirmation



To benefit future generations, I/we declare this commitment to assure the continuity of Jewish services and programs in **(Community)** and I/we affirm that I/we have made the following legal arrangements for my/our gift.

Name: _____ City: _____ State: _____

Email: _____ Phone: _____

I/We intend for the following organization(s) to benefit from my/our Legacy gift:

Please show the percentage or amount of your gift to each organization:

- | | |
|--------------------|--------------------|
| _____ Organization | _____ Organization |
| _____ Organization | _____ Organization |
| _____ Organization | _____ Organization |
| _____ Organization | _____ Organization |
| _____ Organization | _____ Organization |
| _____ Organization | _____ Other: _____ |

Optional Section

My/Our commitment is within the following document: (please list amount or percentage)

- _____ Gift in Will or Trust (can be percentage, residual, or specific amount)
- _____ Beneficiary of Retirement Plan, Administered by: _____
- _____ Beneficiary of Life Insurance Policy, Insurance Company: _____
- _____ Cash Endowment Gift
- _____ Gift that provides lifetime income (Charitable Gift Annuity or Charitable Remainder Trust)
- _____ Gift that provides income to heirs (Charitable Gift Annuity or Charitable Lead or Remainder Trust)
- _____ Real estate, Personal property, Securities, Specialty asset, Business Interest
- _____ Other: _____

Attorney, Financial Advisor, Family member, Executor, or Trustee for my/our gift is:

Name: _____ Phone or Email: _____

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

PLEASE COMPLETE AND RETURN THIS FORM TO:

(name, phone, and email of contact person)

The (lead organization) is here to assist you in fulfilling your philanthropic goals.