

Letter outlining next steps for those who haven't articulated how they are going to make their commitment

*Date*

*Name*

*Address*

*City, State, Zip*

Dear *Name*,

Thank you for committing to leave a legacy to *Organization ABC*. By doing so you are contributing to the long term health and vitality of our *organization/synagogue/school* and insuring (*write a very brief statement about your role in the community*) exists for future generations.

Now that you have declared your intent we hope you will take the next step and formalize your commitment. But what's the first step? What resources are available to you? What legacy vehicle makes the most sense given your particular financial situation? The answers to these questions and many others lie with your estate attorney or financial advisor. federation/Jewish community foundation staff can also offer assistance. Where should you begin?

#### Schedule an appointment

Make an appointment with your professional advisor or Jewish community/federation staff to discuss your wishes. He/she will take the lead from you – so be prepared before you meet. Know what you hope to accomplish with your charitable legacy.

#### Ask questions

- Is there an asset that is best utilized for making charitable gifts?  
What are the tax implications of this gift?
- How will this gift impact what I am able to pass on to my heirs?
- If I change my mind, can this plan be altered?
- What if my circumstances change?
- Should I establish my legacy gift as part of my estate plan (bequest, life insurance or IRA) or should I make the gift while I am living?

#### Keep the process moving

Give your advisor a date by which you would like your legacy commitment formalized.

#### Let us know

Once the necessary paper work is in place, please sign the enclosed Legacy Gift confirmation form or send some other form of document to show formalization of your commitment.

If we can be of any further assistance as you work through this process, please don't hesitate to contact (name, phone, email of contact person)

With appreciation for your legacy commitment,

*Name of Executive Director or Legacy Team member*

*Title of Signer*