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**Create a Jewish Legacy**

**LEGACY GIFT CONFIRMATION**

I/We \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_ confirm that I

(Name(s)) (City) (State)

**legally provided for my commitment to the Create a Jewish Legacy Program of Orange County, California for the benefit of the following local institutions: (check all that apply)**

\_\_\_\_\_ Beth Jacob Congregation of Irvine \_\_\_\_\_ Jewish Federation & Family Services OC

\_\_\_\_\_ Bureau of Jewish Education OC \_\_\_\_\_ Tarbut V’Torah

\_\_\_\_\_ Community Scholar Program \_\_\_\_\_ Temple Bat Yahm

\_\_\_\_\_ Hebrew Academy \_\_\_\_\_ Temple Beth El

\_\_\_\_\_ Heritage Pointe \_\_\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I have provided for this gift within my estate plan and confirm I have made the appropriate legal arrangements to ensure this will be accomplished on or about the time of my passing (or I have already funded a permanent endowed gift). **I have currently provided that my commitment is acknowledged within the following document:**

\_\_\_\_ Bequest in my will or trust \_\_\_\_ Life Insurance Policy

\_\_\_\_ Remainder of IRA and other retirement plan \_\_\_\_ Charitable Remainder Trust

\_\_\_\_ Gift of real estate, securities or other property \_\_\_\_ Donor Advised Fund

\_\_\_\_ Charitable Gift Annuity \_\_\_\_ Endowment already funded during lifetime

*OPTIONAL*: Assistance to provide for my legacy commitment (please designate adviser):

My estate planning attorney is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone/email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

My financial planner is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone/email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Donor name(s):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**City/State/Zip:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Phone:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Email:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_

**Signed Date**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_

**Signed Date**

Create a Jewish legacy is sponsored and presented by the Jewish Community Foundation of Orange County and is a collaborative effort of the local agencies, synagogues and day schools listed above.

The Jewish Community Foundation’s professional staff is here to assist you in fulfilling your philanthropic goals. Please contact us for more information.

**If you have not already submitted confirmation of your legacy gift, PLEASE COMPLETE AND RETURN TO: Jewish Community Foundation Orange County**

**1 Federation Way, Suite 210**

**Irvine, California 92603**

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