

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.**