

LEGACY GIFT CONFIRMATION

Today, Tomorrow and TOGETHER.

I/We _____ ,
NAME

of _____ , _____ ,
CITY STATE

confirm that I/we have legally provided for my commitment for the benefit of the following organization(s):

I/We confirm that I/we have made appropriate legal arrangements to assure that my/our legacy gift will be accomplished according to my/our wishes. My/Our commitment is acknowledged within the following document:*

- ☐ Bequest in Will
☐ Beneficiary of a Life Insurance Policy
☐ Beneficiary of a Retirement Plan
☐ Charitable Gift Annuity (CGA)
☐ Charitable Remainder Trust
☐ Charitable Lead Trust
☐ Cash Endowment Gift
☐ Other (please describe) _____

* Please provide a copy of the pertinent pages to make sure that your wishes are met.

I am/We are pleased to be able to support the Jewish community in the Heart of New Jersey through my/our legacy gift. The approximate value of my/our commitment will be \$_____ or _____% of my/our estate.

DONOR SIGNATURE

DATE

DONOR SIGNATURE

DATE

OPTIONAL: Assistance to provide for my legacy commitment given by (Please designate adviser):

My/Our estate planning attorney is: _____ Phone: _____

My/Our financial planner is: _____ Phone: _____

Other: _____

For more information please contact: Susan Antman, Executive Director, Jewish Federation in the Heart of New Jersey at 732-588-1800 or susana@jewishheartnj.org



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