

Legacy Gift Formalization

Thank you for your promise to the Tidewater Jewish community to provide for future generations and assure continuity of services and programs by signing the Confirmation of Commitment. We are asking for you to confirm the formalization of your legacy gift.

I/We _____, of _____, _____,
PRINT NAME CITY STATE

confirm that I/we have provided for my/our promise to make a legacy gift for the benefit of the following organization(s):

The approximate value of my/our promise will be \$ _____ or _____% of my/our estate.

I/We confirm that I/we have made appropriate formal 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 or Trust
- Beneficiary of Retirement Plan Assets (IRA, 401k, etc.)
- Beneficiary of Life Insurance Policy
- Other (please describe) _____

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

DONOR SIGNATURE DATE

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OPTIONAL:

My/Our estate planning attorney is: _____ Phone/Email: _____
My/Our financial planner is : _____ Phone/Email: _____
Other (family member, executor, trustee) _____ Phone/Email: _____

TJF creates fund agreements to document your wishes. Please check here if you do not want to create a formal fund document in your name. Your gift will be directed to the unrestricted fund(s) of, or use by, the agency(cies) of your choice.

LIFE & LEGACY® is jointly funded by the Harold Grinspoon Foundation and the Tidewater Jewish Foundation, and in partnership with the following:

- Beth Sholom Village
- Chabad of Tidewater
- Congregation Beth El
- Hebrew Academy of Tidewater
- Jewish Family Service of Tidewater
- Ohel Sholom Temple
- Simon Family JCC
- Strelitz Early Childhood Educational Center
- Temple Emanuel
- Toras Chaim
- United Jewish Federation of Tidewater



PLEASE COMPLETE & RETURN THIS FORM TO:
Tidewater Jewish Foundation
5000 Corporate Woods Drive, Suite 200, Virginia Beach, VA 23462

THE TIDEWATER JEWISH FOUNDATION IS HERE TO ASSIST YOU IN FULFILLING YOUR PHILANTHROPIC GOALS.
Contact Kaitlyn Oelsner at 757-965-6103 or koelsner@ujft.org for more information

