

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(S) 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

DONOR SIGNATURE

DATE

OPTIONAL:

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

My/Our financial planner: _____ 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:

- B'nai Israel Congregation
- Beth Shalom Village
- Chabad of Tidewater
- Congregation Beth El
- Jewish Family Service of Tidewater
- KBH Kempsville Conservative Synagogue
- Ohel Shalom Temple
- Simon Family JCC
- Strelitz International Academy
- Temple Emanuel
- Temple Israel
- United Jewish Federation of Tidewater

Please return this form to:
Tidewater Jewish Foundation
5000 Corporate Woods Drive, Suite 200
Virginia Beach, VA 23462

