



# Legacy Gift Confirmation

**It is with great pleasure and pride that I declare my legacy commitment to the Stamford Jewish Community.**

For the benefit of future generations, I have made the appropriate legal arrangements to support the organizations indicated.

- Bi Cultural Hebrew Academy
- Chabad New Canaan
- Chabad Stamford
- Congregation Agudath Sholom
- Friendship Circle
- Schoke Jewish Family Service
- Stamford JCC
- Temple Beth El
- Temple Sinai
- United Jewish Federation
- Young Israel of Stamford

\_\_\_\_\_ print name

\_\_\_\_\_ signature \_\_\_\_\_ date

If you have not already submitted confirmation of your legacy gift, Please return this form to  
 United Jewish Federation  
 2009 Summer Street, Suite 301  
 Stamford, CT 06905

The following information helps organizations plan for their future. **Optional.**

My legacy gift is through:

- Bequest / Will
- Life Insurance policy administered by \_\_\_\_\_
- Retirement Plan Assets / IRA administered by \_\_\_\_\_
- Real Estate
- Charitable Gift Annuity
- Charitable Trust
- Other \_\_\_\_\_

I intend to leave \$ \_\_\_\_\_ or \_\_\_\_\_ % of my estate / inheritable assets.

My attorney / advisor for estate planing is \_\_\_\_\_



I understand that this Confirmation of Commitment form is not a legally binding agreement and may be amended or modified at any time.

# GIVING OPTIONS

## WAYS TO ASSURE JEWISH TOMORROWS

### Have you considered making a lasting gift to YOUR Jewish community?

The goal of legacy giving is to help you plan your estate and charitable giving in a way that benefits you, your family and charity. There are many ways you can make these planned gifts and enjoy tax and income benefits.

Your Goal	How it Works	Your Benefits	Your Gift
<ul style="list-style-type: none"> <li>• Maintain control of your assets during life</li> <li>• Make a gift to the organizations you value</li> </ul>	You designate UJF and/or other Stamford organizations as the beneficiary of an amount or percentage of your estate by will, trust or other instrument.	<ul style="list-style-type: none"> <li>• Estate tax charitable deduction</li> <li>• Life use and ownership of your property</li> </ul>	BEQUEST
<ul style="list-style-type: none"> <li>• Guarantee a specific gift amount</li> <li>• Reduce cash outlay supporting larger future gift</li> </ul>	Purchase a new policy and name desired organization as owner or as beneficiary of an existing policy.	<ul style="list-style-type: none"> <li>• Charitable deduction for premiums donated</li> <li>• Make larger gift than you thought possible</li> </ul>	LIFE INSURANCE
<ul style="list-style-type: none"> <li>• Make a gift to charity at your death</li> <li>• Name UJF and/or designated organizations a beneficiary</li> </ul>	You complete a change of beneficiary form, no cost involved.	<ul style="list-style-type: none"> <li>• Estate tax charitable deduction</li> <li>• Lifetime use of asset/income</li> <li>• Avoid or reduce income taxed to heirs</li> </ul>	IRA OR PENSION PLAN
<ul style="list-style-type: none"> <li>• Transfer appreciated property avoiding capital gains tax</li> <li>• Regular income for life or a term of years</li> <li>• Receive the benefit of tax savings from a charitable deduction</li> </ul>	You transfer case of appreciated property to fund a charitable trust. The trust provides you or family members with income for life or a term of years.	<ul style="list-style-type: none"> <li>• Charitable deduction</li> <li>• Income for life or a term of years</li> <li>• Possible income growth over time</li> <li>• Avoidance of capital gains tax</li> </ul>	CHARITABLE REMAINDER TRUST (CRT)
<ul style="list-style-type: none"> <li>• Transfer appreciated property avoiding capital gains tax</li> <li>• Income to charity for life or term</li> <li>• Avoid substantial gift or estate tax</li> <li>• Reduce transfer cost to heirs</li> </ul>	You transfer cash or property to fund a lead trust that makes gifts to UJF and/or designated organization for a number of years. You may receive a charitable deduction. When the trust term ends, your family receives the remainder interest at substantial tax savings.	<ul style="list-style-type: none"> <li>• Gift or estate tax deduction</li> <li>• Asset and appreciation passes to family at a reduced transfer cost</li> </ul>	CHARITABLE LEAD TRUST (CLT)
<ul style="list-style-type: none"> <li>• Remain in your home for life</li> <li>• Receive a current charitable income tax donation</li> </ul>	You gift property to UJF / designated organization but retain the right to use the property during your life. You pay maintenance, insurance and property taxes.	<ul style="list-style-type: none"> <li>• Charitable deduction</li> <li>• Lifetime use of property</li> </ul>	LIFE ESTATE RESERVED

**For more information, please contact:**  
United Jewish Federation

