

## Bequest Intention Form

If it is your intention to provide for the Jewish Community Foundation with a bequest or other future gift, we would like to include you in our Legacy Society and properly thank you and acknowledge your gift during your lifetime. Please complete this form and return it to the Foundation offices. This is a confidential record.

This Bequest Intention Form is not a legal document. It simply serves as a way for us to appreciate and recognize your generosity.

☐ I have already included the Jewish Community Foundation in my estate plan.

☐ I intend to include the Jewish Community Foundation in my estate plan.

*If you are willing to provide us with the details of your plans, we thank you.*

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### MY BEQUEST WILL BE:

☐ A PERCENTAGE OF MY ESTATE

☐ A SPECIFIC DOLLAR AMOUNT

☐ THE RESIDUE OF MY ESTATE

☐ A SPECIFIC ITEM OF VALUE

☐ LIFE INSURANCE

☐ RETIREMENT PLAN PROCEEDS

THE APPROXIMATE VALUE OF MY BEQUEST WILL BE: \_\_\_\_\_

☐ MY BEQUEST IS UNRESTRICTED

☐ IT IS MY INTENTION THAT MY BEQUEST BE USED FOR THE FOLLOWING PURPOSES: \_\_\_\_\_

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### INFORMATION ABOUT YOU:

YOUR NAME: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_

SPOUSE NAME: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_

PHONE: (HOME) \_\_\_\_\_ (WORK) \_\_\_\_\_

EMAIL: \_\_\_\_\_ FAX: \_\_\_\_\_

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### Unless you indicate otherwise, a member of our staff will call you.

☐ I look forward to talking with you about this gift intention. I understand that listing this gift may be an incentive for others to give and I am willing to be publicly acknowledged.

☐ I understand you would like to contact me and I would be happy to discuss this with you, but I prefer not to be listed or acknowledged publicly.

☐ I understand you would like to contact me, but I prefer to remain anonymous and request no contact or acknowledgment.

SIGNATURE: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_