

Bequest Intention Form Jewish Family Services

If it is your **intention** to provide for the **Jewish Family Services** through 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 Jewish Family Services in my estate plan.

I intend to include Jewish Family Services in my estate plan.

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

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: _____

INFORMATION ABOUT YOU:

YOUR NAME: _____ DATE OF BIRTH: _____

SPOUSE NAME: _____ DATE OF BIRTH: _____

MAILING ADDRESS: _____

PHONE: (HOME) _____ (WORK) _____

EMAIL: _____ FAX: _____

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: _____