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Description automatically generated Insert logo, address, etc.**

**Legacy Gift Confirmation**

I/We \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

Name(s) City State

confirm that I/we have legally provided for my/our commitment to **insert name of congregation.**

I/we have provided for this gift within my/our estate plan and confirm I/we have made the appropriate legal arrangements to ensure this will be accomplished on or about the time of my/our passing (or I/we have already funded a permanent endowed gift). I/we have currently provided that my/our commitment is acknowledged within the following document(s):

* Bequest in my/our will or trust
* Remainder of IRA and other retirement plan
* Gift of real estate, securities or other property
* Charitable Gift Annuity
* Life Insurance Policy
* Charitable Remainder Trust
* Donor Advised Fund
* Endowment already funded during lifetime

OPTIONAL:For assistance with my/our legacy commitment contact (please designate adviser):

Financial Planner \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone/email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Estate Planning Attorney \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone/email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor name(s):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City/State/Zip: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

Signed Date

**Name of congregation’s** staff is here to assist you in fulfilling your philanthropic goals. Please contact \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, for more information. **Insert phone number, email, etc.**