

## 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):

- |  |   |
|--|---|
| <input type="checkbox"/> Bequest in my/our will or trust                   | <input type="checkbox"/> Life Insurance Policy                    |
| <input type="checkbox"/> Remainder of IRA and other retirement plan        | <input type="checkbox"/> Charitable Remainder Trust               |
| <input type="checkbox"/> Gift of real estate, securities or other property | <input type="checkbox"/> Donor Advised Fund                       |
| <input type="checkbox"/> Charitable Gift Annuity                           | <input type="checkbox"/> 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.**