



**LEAVE A LEGACY**  
CONGREGATION B'NAI ISRAEL

**LETTER OF INTENT**

In the tradition of our Jewish faith, I wish to share my blessings by declaring my intent to provide for the needs of future generations at Congregation B'nai Israel.

**It is with deep satisfaction that:**

\_\_\_\_ I/We notify you that I/we have already made a legacy provision in my/our estate plan

\_\_\_\_ I/We shall make a provision during the next \_\_\_\_ months

**With a legacy gift established through a:**

- |   |                                 |
|---|---------------------------------|
| ____ Bequest in my will or trust  | ____ Life Insurance Policy      |
| ____ Remainder of IRA or other retirement plan                                    | ____ Charitable Remainder Trust |
| ____ Gift of real estate, securities or other property                            | ____ Donor-Advised Fund         |
| ____ Charitable Gift Annuity  | ____ Other _____                |
| ____ I wish to establish an endowment now with a current gift of cash or property |                                 |

**Amount of Gift – Please choose one of the following two options:**

\_\_\_\_ The approximate value of my/our commitment will be \$\_\_\_\_\_ or \_\_\_\_% of \_\_\_\_\_.

\_\_\_\_ I/We prefer to keep the details of this commitment confidential.

**Privacy Statement:** To encourage others to make commitments

\_\_\_\_ I/We permit my name to be listed in printed materials \_\_\_\_\_

\_\_\_\_ I/We prefer to remain anonymous. *(My name should appear as)*

**Name(s):** \_\_\_\_\_

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

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

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_ **Birthday:** \_\_\_\_\_

*I understand that this letter of intent is not a legal obligation and may be changed at my discretion at any time.*

\_\_\_\_\_  
**Signed**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Signed**

\_\_\_\_\_  
**Date**

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