

**Triangle Jewish Community  
LIFE & LEGACY  
Legacy Gift Confirmation**



***“As my parents planted for me before I was born, so do I plant for those who will come after me.” -Talmud***

I/We, \_\_\_\_\_, of \_\_\_\_\_, \_\_\_\_\_  
Name(s) City State

Confirm that I/we have legally provided for my/our commitment to the Life and Legacy program for the benefit of the following organization(s):

- Beth El Synagogue
- Jewish Federation of Durham Chapel Hill
- Judea Reform Congregation
- Kehillah Synagogue
- Sandra E. Lerner Jewish Community Day School
- Temple Beth Or
- Other \_\_\_\_\_

I/We have provided for this gift within my/our estate plan and confirm that I/we have made the appropriate legal arrangements to assure that my/our legacy gift will be accomplished according to my/our wishes. My/Our commitment is acknowledged within the following document:

- Bequest or Will
- Donor Advised Fund
- Life Insurance (Insurance company: \_\_\_\_\_)
- Gift of Real Estate, Securities, other property
- Retirement Plan Assets - IRA (Administered by: \_\_\_\_\_)
- Charitable Remainder Trust
- Charitable Gift Annuity
- Other (please specify) \_\_\_\_\_

***\*Please provide a copy of the pertinent pages to make sure that your wishes are met.***

I am/We are pleased to be able to support the Jewish community through my/our legacy gift. The approximate value of my/our contribution will be \$ \_\_\_\_\_ or \_\_\_\_\_% of my/our IRA/estate/other.

*I understand that this legacy gift confirmation form is not a legally binding agreement and may be amended or modified at any time.*

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

*Assistance to provide for my legacy commitment given by (Optional):*

Estate Planning Attorney: \_\_\_\_\_

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

Financial Planner/Advisor: \_\_\_\_\_

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

Other (family member, executor, trustee): \_\_\_\_\_

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

**Support for LIFE & LEGACY is provided by the Harold Grinspoon Foundation & the Jewish Federation of Durham Chapel Hill**

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