



Legacy Gift Confirmation/Formalization Form

I/We _____, of _____,
(Name/s) (City) (State)

Confirm that I/we have legally provided for my/our commitment to the LIFE & LEGACY™ Program of the Greater Phoenix community for the benefit of the following organizations which will be held at the Jewish Community Foundation of Greater Phoenix (Tax ID # 47-0874376):

LIFE & LEGACY COMMUNITY PARTNER ORGANIZATIONS (please check off all that apply):
(If you prefer, you may fill out multiple copies of this form and give to each organization you designate)

- Congregation Or Tzion**
- Arizona Jewish Historical Society**
- East Valley Jewish Community Center**
- Hillel at ASU**
- Jewish Family & Children's Service**
- Jewish Federation of Greater Phoenix**
- Valley of the Sun JCC**
- Jewish Free Loan**
- Minkoff Center for Jewish Genetics**
- Pardes Jewish Day School**
- Temple Chai**
- Temple Emanuel of Tempe**
- Temple Kol Ami**

I/We affirm that I/we have made appropriate legal arrangements to assure that this will be accomplished according to my/our wishes. My/Our legacy gift in the approximate amount of \$_____ or _____% has been acknowledged within the following document:*

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

- Last Will & Testament or Living Trust
- IRA or other Retirement Plan—Administered By: _____
- Life Insurance Policy—Insurance Company: _____
- Fund established at the Jewish Community Foundation—Name & Type: _____
- Charitable Remainder Trust
- Charitable Lead Trust
- Charitable Gift Annuity (CGA)
- Other (please describe): _____

If you have not filled out a Declaration of Commitment form, please complete the following information in this box:

Please check all that apply:

- I/We understand that this **commitment is revocable and may be modified at my/our discretion**. I/we endeavor to notify the recipient organization(s) accordingly.
- I/We understand that you will inform the **additional designated organization(s)** of this gift (if applicable).
- I/we would like to remain **anonymous** at this time.
- You have my permission to **recognize me/us publicly in all LIFE & LEGACY™ marketing materials** (without disclosing gift details).
- Please have a Jewish Community Foundation staff member contact me/us regarding **completing my/our page in the Endowment Book of Life**

Names for Formal Recognition (e.g., Ruth and Samuel Donor, Ms. Ruth Donor)

Street Address

City, State ZIP

Home Phone

OR

Mobile Phone

Email

Donor Signature

Date of Birth

Date

Donor Signature

Date of Birth

Date

OPTIONAL: Assistance to provide for my legacy commitment given by (please designate adviser):

My/Our estate planning attorney is:

Contact Information:

My/Our financial planner is:

Contact Information:

Other (family member, executor, trustee)

Contact Information:

Please complete & return this form to either:

Rachel Rabinovich, LIFE & LEGACY Program Director

Jewish Community Foundation of Greater Phoenix

12701 N. Scottsdale Road, Suite 202

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Direct 480.481.1785 | rrabinovich@jcfphoenix.org

Nicky Spivak, Executive Director

Congregation Or Tzion

16415 N. 90th Street, Scottsdale, AZ 85260

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Jewish Community Foundation of Greater Phoenix

Building a permanent source of financial support for a vibrant, enduring Jewish community

www.jcfphoenix.org