



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 Center for Jewish Philanthropy of Greater Phoenix (*Jewish Community Foundation Tax ID # 47-0874376*):

LIFE & LEGACY COMMUNITY PARTNER ORGANIZATIONS (please check off all that apply):

(You may complete multiple copies of this form to give to each organization you designate, or you may provide additional information about your legacy gifts in the space provided on the next page)

- | | |
|---|---|
| <input type="checkbox"/> Arizona Jewish Historical Society | <input type="checkbox"/> National Council of Jewish Women Arizona |
| <input type="checkbox"/> Beth Joseph Congregation | <input type="checkbox"/> Minkoff Center for Jewish Genetics |
| <input type="checkbox"/> Phoenix Hebrew Academy | <input type="checkbox"/> Pardes Jewish Day School |
| <input type="checkbox"/> Bureau of Jewish Education | <input type="checkbox"/> Phoenix Community Kollel |
| <input type="checkbox"/> Center for Jewish Philanthropy of Greater Phoenix | <input type="checkbox"/> PJ Library |
| <input type="checkbox"/> Congregation Or Tzion | <input type="checkbox"/> Temple Beth Shalom of the West Valley |
| <input type="checkbox"/> East Valley Jewish Community Center | <input type="checkbox"/> Temple Chai |
| <input type="checkbox"/> Gesher Disability Resources | <input type="checkbox"/> Temple Emanuel of Tempe |
| <input type="checkbox"/> Hillel at ASU | <input type="checkbox"/> Temple Kol Ami |
| <input type="checkbox"/> Jewish Family & Children's Service | <input type="checkbox"/> Valley Beit Midrash |
| <input type="checkbox"/> Jewish Free Loan | <input type="checkbox"/> Valley of the Sun Jewish Community Center |

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 page(s) to ensure your wishes are met.***

- Last Will & Testament or Living Trust
- IRA or other Retirement Plan—Administered By: _____
- Life Insurance Policy—Insurance Company: _____
- Fund established with Center for Jewish Philanthropy—Name & Type: _____

- Cash Gift: Please make check payable to Jewish Community Foundation and provide name of the organization
- Charitable Remainder Trust/Charitable Lead Trust
- Charitable Gift Annuity (CGA)
- Real Estate or Business Interest
- Other (please describe): _____

Please use this space to provide any additional details about your legacy gift (i.e., designating your gift to a specific area, how much each organization will receive, etc.)

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).
- I/we would like to learn more about **completing my/our page in the Endowment Book of Life**

Names for Formal Recognition (unless otherwise note, couples listed as Wife & Husband Last Name)

Street Address

City, State ZIP

Home Phone

OR

Mobile Phone

Email

Donor Signature

Date of Birth

Date

Donor Signature

Date of Birth

Date

Assistance to provide for my legacy commitment given by (please provide as much information as possible):

My/Our estate planning attorney is:

Contact Information:

My/Our financial planner is:

Contact Information:

Other (family member, executor, trustee)

Contact Information:

Before returning this form, please print, sign and date it.

Return the completed form to

Rachel Rabinovich, *LIFE & LEGACY Program Director*

Center for Jewish Philanthropy of Greater Phoenix

12701 N. Scottsdale Road, Scottsdale, AZ 85254

480.481.1785

lifeandlegacy@phoenixcjp.org

The Jewish Community Foundation and the Jewish Federation of Greater Phoenix have integrated to form the Center for Jewish Philanthropy of Greater Phoenix