

To benefit future generations, I/we declare this commitment to assure the continuity of Jewish services and programs in Pinellas & Pasco and I/we affirm that I/we have made the following legal arrangements for my/our gift.

Name(s): \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_

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

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

**I/We have provided for the following organization(s) to benefit from my/our Legacy gift:**

*(Please show the percentage or amount of your gift for each organization)*

Organization: \_\_\_\_\_ Gift Amount: \_\_\_\_\_

Organization: \_\_\_\_\_ Gift Amount: \_\_\_\_\_

Organization: \_\_\_\_\_ Gift Amount: \_\_\_\_\_

Organization: \_\_\_\_\_ Gift Amount: \_\_\_\_\_

Organization: \_\_\_\_\_ Gift Amount: \_\_\_\_\_

**My/Our commitment is acknowledged within the following document:**

*(Please provide a copy of the pertinent pages to ensure that your philanthropic wishes are followed)*

\_\_\_\_\_ Gift in Will or Trust *(can be percentage, residual, or specific amount)*

\_\_\_\_\_ Beneficiary of Retirement Plan, *Administered by:* \_\_\_\_\_

\_\_\_\_\_ Beneficiary of Life Insurance Policy, *Insurance Company:* \_\_\_\_\_

\_\_\_\_\_ Beneficiary of Donor Advised Fund

\_\_\_\_\_ Cash Endowment Gift

\_\_\_\_\_ Gift that provides lifetime income *(ex. Charitable Remainder Trust)*

\_\_\_\_\_ Real estate, Personal property, Securities, Business Interest

**Please designate advisors who have provided assistance to your legacy commitment:**

My/our estate planning attorney is: \_\_\_\_\_ Phone/Email: \_\_\_\_\_

My/our financial planner is: \_\_\_\_\_ Phone/Email: \_\_\_\_\_

Other (Executor/Trustee/Family Member): \_\_\_\_\_ Phone/Email: \_\_\_\_\_

**PLEASE COMPLETE AND RETURN THIS FORM TO:**

**Beth Levin, (813) 769-4769, [Beth@topjewishfoundation.org](mailto:Beth@topjewishfoundation.org)**

**TOP Jewish Foundation is here to assist you in fulfilling your philanthropic goals.**

# Formalizing your legacy gift

## How can I formalize my gift?

Here are the most common options:

|                               | Benefits   | Costs and paperwork                                  |
|-------------------------------|--|--|
| <b>Will or Trust</b>          | Flexibility; give a percentage, the remainder, a fixed amount, or a specific asset | Legal fees to update your will or trust              |
| <b>Retirement account</b>     | Tax-smart; avoids income taxes to heirs, estate taxes where applicable             | No cost to submit a new beneficiary designation form |
| <b>Life insurance policy*</b> | Direct assets to the community that family members no longer need                  | No cost to submit a new beneficiary designation form |

## How much should I leave?

Consider the impact you would like to have on the organization, the community, and future generations. If every donor gives what they can, we can ensure a bright Jewish future. Some options:

|                       | Implications   |
|-----------------------|--|
| <b>A fixed amount</b> | Your gift, when added to your organization's endowment funds, will yield ~5% annually for the organization — in perpetuity |
| <b>A percentage</b>   | Specify a percentage; the gift amount will rise or fall with the economy and the value of your estate                      |
| <b>The remainder</b>  | Leave heirs the amounts you think they should have; leave the rest to the community and the organizations you love         |

*\*Whole life or other permanent policy*

## What language can I give my estate planner?

To Tampa Orlando Pinellas Jewish Foundation, Inc. of Tampa, FL, Federal Tax ID # 59-2053655, for the ultimate benefit of [ organization name ] of [ city ], Florida, I give [ % of the remainder of my estate / the sum of \$ \_\_\_\_\_ ].

## Who are the LIFE & LEGACY Community Participants?

- Beth Israel, the Jewish Congregation of Sun City Center
- Congregation Beth Am
- Congregation Kol Ami
- Congregation Rodeph Sholom
- Hillel Academy of Tampa
- Hillels of the Florida Suncoast
- Tampa Jewish Community Centers/Federation
- Tampa Jewish Family Services
- University of Florida Hillel

## More Information

Contact a member of your organization's legacy team, or Beth Levin, LIFE & LEGACY Coordinator at TOP Jewish Foundation (813.769.4769 / [beth@topjewishfoundation.org](mailto:beth@topjewishfoundation.org)).

*Please note that this document is informational only and does not constitute legal or tax advice. Please consult with a financial or estate planning professional to understand the implications of a gift for your particular circumstances and goals.*