



We make giving easier.

## Legacy Gift Confirmation



To benefit future generations, I/we declare this commitment to assure the continuity of Jewish services and programs in Tampa 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: \_\_\_\_\_

### 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

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).

*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.*