

Letter of Intent

"A person's every act begins with a dream and ends with one."
THEODOR HERZL

In keeping with Jewish tradition, I/we wish to share my/our blessings with others. Therefore, I/we make this declaration of commitment to help provide for the needs of tomorrow.

- I/we have already made a legacy provision in my/our estate plan.
- I/we intend to create a legacy within 6 / 9 / 12 months of signing this declaration. (circle one)

Donor Signature _____ Date _____

Donor Signature _____ Date _____

PLEASE PRINT

Name _____ DOB: _____

Name _____ DOB: _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email Address _____

Please identify the vehicle(s) through which you have or plan to create your legacy gift (check all that apply):

- Gift in Will
- Donor Advised Fund
- Charitable Remainder Trust
- Gift in Trust
- Retirement Assets
- Assets: Real Estate, Securities, other property
- Life Insurance
- Cash
- Other (please specify) _____

The approximate value of my/our commitment will be \$ _____ or _____ %.
I/we understand that this legacy gift will be placed in a permanent Endowment fund by the organization(s) selected.

The following named organizations are participating in the LIFE & LEGACY program. They have made a commitment to work and learn together as part of the formal program offered by TOP.

Please check the organization(s) that will benefit from your legacy gift.

- Congregation Beth Shalom
- Jewish Federation of Florida's Gulf Coast
- Temple Ahavat Shalom
- Temple Beth El
- Temple B'nai Israel
- Other (please specify) _____
- Other (please specify) _____

To encourage others to make a commitment to the future, I/we permit my/our name(s) to be listed with other donors. Name(s) as it is to be printed in listing: _____

I/we wish to remain anonymous at this time.