



## COMMITTEE CHAIR

Aimee Segal  
President

Michael Baron  
Immediate Past President

## QUESTIONS?

Carly Litwok  
Executive Director  
carly@harshalom.org  
301.299.7087 ext. 222

## CONGREGATION HAR SHALOM

11510 Falls Road  
Potomac, MD 20854  
HarShalom.org



*Congregation Har Shalom is an inclusive, multi-generational Conservative synagogue community. We inspire the lifelong Jewish journeys of individuals and families by promoting active participation in Jewish life and learning, spirited prayer, community service, and support for the State of Israel and the Jewish people everywhere.*

## Declaration of Intent

- ☐ I/We intend to include a legacy gift to Congregation Har Shalom in my/our estate plan within the next \_\_\_\_\_ months.
- ☐ I/We already made a provision in my/our will or estate plan.
- ☐ Bequest
  - ☐ Life insurance beneficiary
  - ☐ Retirement plan beneficiary
  - ☐ Other \_\_\_\_\_

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip \_\_\_\_\_

Home Phone \_\_\_\_\_

Mobile Phone \_\_\_\_\_

Email \_\_\_\_\_

**Privacy Statement.** Please choose from the following two options:

- ☐ I/We prefer to remain anonymous.
- ☐ To inspire and encourage others to make commitments to Congregation Har Shalom for the future, I/We permit my/our name(s) and image(s) (photographs) to be included in materials.
- My/Our name should appear as follows:

Print name(s) here \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

***This Declaration of Intent is not a legal obligation and may be changed at your discretion.***

# Frequently Asked Questions

**1. Who do I contact, what are my next steps?**

Please contact our Synagogue Administrator, Carly Litwok or fill out the form on the reverse side and return it to the synagogue office.

Carly Litwok; Synagogue Administrator: 301-299-7087 ext. 222 • [carly@harshalom.org](mailto:carly@harshalom.org).

**2. Do I need to give you money now?**

No! A Legacy Gift is a commitment that Har Shalom has been included in your will or estate planning.

**3. Can I change my mind?**

Yes. You can change your mind at any time. This is your gift and your legacy to Har Shalom.

**4. Where is the money being managed?**

Legacy funds were initially invested with the United Jewish Endowment Fund (UJEF) of the Jewish Federation of Greater Washington. With guidance from our Investment Committee, we transitioned the investment to a group of diversified, low cost mutual funds with Vanguard. Decisions on investment changes are made jointly between the President, Treasurer and Synagogue Administrator of Har Shalom. The Board and Congregation will review and approve the Budget Committee's recommendation for usage of a portion of any investment earnings in the Congregation's operating budget.

**5. How will Har Shalom use the funds?**

Legacy Gifts will be used to extend the support you have provided Har Shalom during your lifetime and guarantee that your influence will continue to impact the future. The money will be used to partially fund future operating expenses as well to support religious, social, and educational programming.

**6. Do I need a lawyer?**

Yes and no. Although there are many simple options, i.e. naming Congregation Har Shalom as a beneficiary to receive a designated amount or percentage of the proceeds of a life insurance policy or the remaining balance of a retirement fund, you may wish to consult a lawyer for more complex Legacy Gifts.

The Har Shalom Legacy Circle is being created to recognize donors who thoughtfully provide for the future of Congregation Har Shalom through a Planned Legacy Gift.

When you create a bequest from a Will or Trust for the benefit of Congregation Har Shalom, or designate Congregation Har Shalom as a beneficiary to receive a percentage of the proceeds from a life insurance policy or retirement fund, or similar estate planning gift, you will be permanently honored as such as a member of the Legacy Circle.

