



COMMITTEE CHAIR

Diana Rabinowitz

Jeff Rubin
President

Carly Litwok,
Assistant Executive Director
Staff Liaison

QUESTIONS?

Shelley Engel, FSA,
Executive Director
sengel@harshalom.org
301.299.7087 ext. 222

CONGREGATION HAR SHALOM

11510 Falls Road
Potomac, MD 20854
HarShalom.org



H A R S H A L O M
הר שלום



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 Executive Director, Shelley Engel or our Committee Co-Chair, Diana Rabinowitz or fill out the form on the reverse side and return it to the synagogue office.
Shelley Engel, FSA; Executive Director: 301-299-7087 ext. 222 • sengel@harshalom.org.
Diana Rabinowitz; Committee Chair: 301-801-7053 • diana.rabinowitz17@gmail.com.

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?

Funds received will be professionally managed and invested for the benefit of Congregation Har Shalom through the United Jewish Endowment Fund (UJEF) of the Jewish Federation of Greater Washington. UJEF provides for the pooling of Legacy Gifts from several synagogues and other Jewish institutions and subsequently, as the fund grows, through other professionally managed funds. The pooling of funds allows for the sharing of investment returns and costs with the goal of maximizing returns and minimizing costs. Congregation Har Shalom would share proportionately from the net investment proceeds generated from UJEF. As Congregation Har Shalom's account grows, its proportionate share of the net investment proceeds from UJEF will also increase.

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.

