

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 to the left of each organization)

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

**Whole life or other permanent policy*

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

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?

- Jewish Federation of Pinellas and Pasco Counties
- Temple Ahavat Shalom
- Temple Beth El
- Temple B'nai Israel

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.