Legacy Gift Confirmation

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:________________________________________

_____ Organization:________________________________________

_____ Organization:________________________________________

_____ 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:

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Costs and paperwork</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will or Trust</td>
<td>Flexibility; give a percentage, the remainder, a fixed amount, or a specific asset</td>
</tr>
<tr>
<td>Retirement account</td>
<td>Tax-smart; avoids income taxes to heirs, estate taxes where applicable</td>
</tr>
<tr>
<td>Life insurance policy*</td>
<td>Direct assets to the community that family members no longer need</td>
</tr>
</tbody>
</table>

*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:

<table>
<thead>
<tr>
<th>Implications</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fixed amount</td>
</tr>
<tr>
<td>A percentage</td>
</tr>
<tr>
<td>The remainder</td>
</tr>
</tbody>
</table>

**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.*