

# Congregation Shomrei Torah

## Legacy Gift Information Form



(All information is confidential)

Please type or print so we can insure the accuracy of your wishes

Name or names of Legacy participants: \_\_\_\_\_

\_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone Number: (\_\_\_\_) \_\_\_\_\_ Mobile Phone Number: (\_\_\_\_) \_\_\_\_\_

Email Address: \_\_\_\_\_ Email Address: \_\_\_\_\_

Please check the appropriate option or options below:

\_\_\_\_ I/We have already taken steps to include Congregation Shomrei Torah in our estate plan.

If bequest is made by a married couple, please indicate when the Legacy gift is to be made:

After death of both \_\_\_\_ In whole or in part after death of either member \_\_\_\_

Other arrangements—please explain \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_ I/We have named Congregation Shomrei Torah as a beneficiary of a trust or retirement account.

\_\_\_\_ I/We have not taken any formal steps to make a Legacy Gift. Please contact me/us to discuss how we can honor our intention to leave a Legacy Gift to CST.

Please indicate who should be contacted following the death of a Legacy participant, regarding your legacy gift: i.e. a family member, executor of your estate, institution, bank, insurance company or other. Please provide name and all contact information including email:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please continue to complete the information and signatures on the reverse side of this form

Most Legacy gifts are earmarked for the **“CST Permanent Building Endowment Fund”**--- which was created as a permanent endowment to provide annual funding for upkeep and maintenance of the CST facilities and is a critical component of our annual budgetary needs. If you wish to designate some other fund or activity such as the CST General Operating Budget; or CST Religious School ; etc, It is critical that you be specific so that a member of the Legacy Circle committee can advise you on how your goals can best be accomplished to avoid any difficulty or ambiguity in directing your gift to the proper place and to insure that it can be utilized appropriately and does not conflict with CST board policies that govern establishment and use of funds.

\_\_\_\_\_ I/We specifically designate our Legacy Gift be earmarked for the CST Permanent Building Endowment Fund.

\_\_\_\_\_ I/We request that our Legacy Gift be designated for the following:

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Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Thank you for joining an extraordinary group of committed individuals who share a common vision for the future preservation of our community, our traditions and our heritage.

***The Shomrei Torah Legacy Circle Committee***