

CONGREGATION RODEF SHOLOM

legacy circle confirmation form

Thank you for considering Congregation Rodef Sholom in your will or estate plans. This form is meant to be a notification to Congregation Rodef Sholom that you have made a provision in your estate plan for the synagogue. This is not a legal document.

I/We have made provisions for Congregation Rodef Sholom in my/our estate plans.

Name(s) _____

Address _____

Phone (____) _____ - _____ Email _____@_____

Signature _____ Date _____

I/We have included Congregation Rodef Sholom in my/our estate plan by means of:

- Bequest in will or trust
- Beneficiary of IRA or a 401(k) or 403(b) retirement plan
- Beneficiary of a life insurance policy
- Charitable Gift Annuity
- Charitable Remainder Trust
- Charitable Lead Trust
- Interest in Real Estate

The congregational program and/or purpose we wish our gift to support are:

_____ Use where most needed (Unrestricted)
_____ Endowment (Restricted)
_____ Other

- The current value of this gift is approximately _____
- I/We do not know the value.
- I/We do not wish to disclose the value.

- On the listing of donors, my/our name(s) should appear as:
- I/We do not wish my/our name(s) to appear on any public roster and prefer to remain anonymous.

May we contact you personally to further discuss your gift intentions?

Yes No

Please return to:

James G. Leventhal, Congregation Rodef Sholom, 170 No. San Pedro Road, San Rafael, CA 94903
or by email: james@rodefsholom.org