Discussion Guide for Legacy Giving

1. **What is your goal in making this Legacy Gift to Congregation Shalom?**
2. **What type of gift are you considering giving to Congregation Shalom?**
   1. Employer/ personal individual retirement account (IRA), or life insurance account(s).
   2. Will, trust, or estate documents in whole or as a residual after giving to your heirs.
   3. Appreciated security,
   4. Charitable lead trust, charitable remainder trust, charitable gift annuity
   5. Required minimum distribution (RMD) from your retirement accounts to Shalom.
   6. Other
3. **How would you like Congregation Shalom to use your gift?**
   1. Establish an Endowment-Unrestricted or Restricted Purpose
   2. Use for Ongoing Needs-Unrestricted or Restricted Purpose
4. **What is the amount of your gift (if known)?**
5. **How would you like to be honored for this gift?**