



Legacy Giving Checklist

We can use the following information to assist you and your advisors in designing the optimum legacy plan.

1. Do you want to do a simple codicil in your estate plans with the following sample wording you can give to your attorney? Yes ___ No ___

I give (cash of \$_____ or ___% of my estate or specified property) to (legal name of organization and tax identification number) to be used for (designation).

2. Would you be interested in making a gift that will provide you with lifetime income? Yes ___ No ___

3. Do you own appreciated stock? Yes ___ No ___

4. Can you gift a part of or your entire retirement plan? Yes ___ No ___

5. Do you own real estate or other business interests? Yes ___ No ___

6. Do you own life insurance? Yes ___ No ___

If so, do you have a need for all of the death benefit? Yes ___ No ___

Would you consider purchasing a new life insurance policy to fund a legacy gift? Yes ___ No ___

If so, contact the custodian of your plan and designate the charitable organization(s) as the beneficiary of the plan.

We encourage you to consult with your professional advisors before finalizing any charitable gift.

Create a Jewish Legacy