

# Legacy Gift Confirmation

Thank you for your promise to the Palm Beach Jewish Community to provide for future generations and assure continuity of services and programs by signing the Letter of Intent. The letter you signed will provide a legacy gift to your favorite organizations. We are asking for you to confirm the formalization of your legacy gift.

I/We \_\_\_\_\_, of \_\_\_\_\_, \_\_\_\_\_  
NAME CITY STATE

confirm that I/we have legally provided for my promise to LIFE & LEGACY™ for the benefit of the following organization(s):  
 \_\_\_\_\_  
 \_\_\_\_\_

The approximate value of my/our promise will be \$ \_\_\_\_\_ or \_\_\_\_\_% of my/our estate.

I/We have provided for this gift within my/our estate plan and confirm that I/we have made the appropriate legal arrangements to assure that this will be accomplished according to my/our wishes. My/Our commitment is acknowledged within the following document.

- Bequest in Will or Trust
- Beneficiary of Retirement Plan Assets (IRA)
- Beneficiary of Life Insurance Policy
- Charitable Trust
- Outright Gift / Appreciated Assets Cash
- Other (please describe) \_\_\_\_\_

Donor Signature

Date

Donor Signature

Date

**OPTIONAL:**

My/Our estate planning attorney is: \_\_\_\_\_ Phone: \_\_\_\_\_

My/Our financial planner is: \_\_\_\_\_ Phone: \_\_\_\_\_

Other (family member, executor, trustee): \_\_\_\_\_ Phone: \_\_\_\_\_

LIFE & LEGACY™ is sponsored by Jewish Federation of Palm Beach County and its Jewish Community Foundation and is a collaborative effort of the following agencies and synagogues:



Affiliate Partners: Palm Beach Synagogue | MorseLife Health System | Arthur I. Meyer Jewish Academy

**PLEASE COMPLETE AND RETURN THIS FORM TO:**

**Elaine Aronoff, Associate Director**

**Jewish Federation of Palm Beach County  
 Jack, Joseph and Morton Mandel Building**

**1 Harvard Circle, Suite 100, West Palm Beach, FL 33409**

