



# Create a Jewish Legacy LETTER OF INTENT



In the tradition of our Jewish faith, I wish to share my blessings by declaring my intent to provide for the needs of future generations.

**It is with deep satisfaction that:**

- I have made a provision
- I shall make a provision during the next \_\_\_\_\_ months.

**I wish to support the following Orange County institutions: (check all that apply)**

- |   |  |
|---|--|
| <input type="checkbox"/> Beth Jacob Congregation of Irvine      | <input type="checkbox"/> Merage Jewish Community Center        |
| <input type="checkbox"/> Community Scholar Program              | <input type="checkbox"/> Tarbut V'Torah                        |
| <input type="checkbox"/> Congregation B'nai Israel              | <input type="checkbox"/> Temple Bat Yahm                       |
| <input type="checkbox"/> Hebrew Academy                         | <input type="checkbox"/> Temple Beth El of South Orange County |
| <input type="checkbox"/> Heritage Pointe                        | <input type="checkbox"/> University Synagogue                  |
| <input type="checkbox"/> Jewish Federation & Family Services OC | <input type="checkbox"/> Other _____                           |

**with an endowment established through a:**

- |  |   |
|--|---|
| <input type="checkbox"/> Bequest in my will or trust                       | <input type="checkbox"/> Life Insurance Policy      |
| <input type="checkbox"/> Remainder of IRA and other retirement plan        | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Gift of real estate, securities or other property | <input type="checkbox"/> Donor Advised Fund         |
| <input type="checkbox"/> Charitable Gift Annuity                           | <input type="checkbox"/> Other _____                |

**Privacy Statement:** To encourage others to make commitments to the future we occasionally list names in printed materials and/or on our website.

- I permit my name to be listed in printed materials. \_\_\_\_\_
- I prefer to remain anonymous. *My name should appear as* \_\_\_\_\_

**Name(s):** \_\_\_\_\_

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

**City/State/Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

I understand that this letter of intent is not a legal obligation and may be changed at my discretion at any time.

\_\_\_\_\_  
**Signed** \_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Signed** \_\_\_\_\_  
**Date**

The Jewish Community Foundation's professional staff can assist in creating endowed gifts. Please contact us with any questions or to establish your legacy. Together, we guarantee a Jewish tomorrow.