

YOUR LEGACY PLAN IN 5 easy steps



1 Meet with the Jewish Community Foundation Orange County (JCFOC) to develop your plan

Complimentary and confidential: all legacy planning phone calls, meetings and changes are offered at no charge.



Contact Wendy Arenson,
Executive Director,
at (949) 435-3490.

2 Select one or more causes to support

Example: Your synagogue, favorite organization and alma mater, secular and/or Jewish



3 Decide what to donate



In consultation with your professional advisor
Example: IRA, % of trust

4 Use this language to accomplish your charitable goals

Example: On your IRA Beneficiary Form or in your will or trust



Jewish Community Foundation
Orange County
(Tax ID Number 95-3645825)

To be distributed according to the most recently dated Legacy Instructions on file with the Jewish Community Foundation Orange County.

5 Sign your completed Letter of Intent or Legacy Gift Confirmation



JCFOC will honor your intentions, and you may make changes at any time at no charge.

CELEBRATE!



Join us at our community-wide Legacy Appreciation Celebrations, and participate by signing the Endowment Book of Life.

THANK YOU FOR CREATING YOUR JEWISH LEGACY!

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