



LIFE & LEGACY LEGACY GIFT CONFIRMATION



I/We _____, of _____, _____ confirm that I/we
Name(s) City State

legally provided for my commitment to the LIFE & LEGACY Program of Orange County, California for the benefit of the following local 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"/> Temple Bat Yahm |
| <input type="checkbox"/> Congregation B'nai Israel | <input type="checkbox"/> Temple Beth El of South Orange County |
| <input type="checkbox"/> Hebrew Academy | <input type="checkbox"/> Temple Beth Sholom |
| <input type="checkbox"/> Heritage Pointe | <input type="checkbox"/> Temple Beth Tikvah |
| <input type="checkbox"/> Irvine Hebrew Day School | <input type="checkbox"/> University Synagogue |
| <input type="checkbox"/> Jewish Collaborative of Orange County | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Jewish Federation of Orange County | |

I/We have provided for this gift within my/our estate plan and confirm I/we have made the appropriate legal arrangements to ensure this will be accomplished on or about the time of my/our passing (or have already funded a permanent endowed gift).

I/We have currently provided that my commitment is acknowledged within the following document:

- | | |
|--|---|
| <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"/> Endowment already funded | <input type="checkbox"/> Other _____ |

OPTIONAL: Assistance to provide for my legacy commitment (please designate adviser):

My estate planning attorney is: _____ Phone/email: _____
My financial planner is: _____ Phone/email: _____

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

I/We permit my name to be listed in printed materials. _____
 I/We prefer to remain anonymous. *My/Our name should appear as:* _____

Donor name(s): _____
Address: _____
City/State/Zip _____
Phone: _____ **Email:** _____

Sign **Date** **Sign** **Date**

LIFE & LEGACY is sponsored and presented by the Jewish Community Foundation Orange County and is a collaborative effort of the local agencies, synagogues and day schools listed above. Your completed form will only be shared by JCFOC with the charitable beneficiary(ies) you selected.

The Jewish Community Foundation's professional staff is here to assist you in fulfilling your philanthropic goals. Please contact us for more information.