

Legacy Commitment Form

In keeping with Jewish tradition, I/we wish to share my/our blessings with others. Therefore, I/we make this Legacy Commitment to help provide for the Jewish community of tomorrow.

___ I/we intend to create a Jewish Legacy or I/we have already done so but haven't shared the information with you.

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

___ I/we wish to be recognized in the Legacy Society as follows: _____

___ I/we wish to remain anonymous.

Type of planned gift:

- | | |
|--|--|
| <input type="checkbox"/> Bequest in my/our will | <input type="checkbox"/> Life insurance policy/beneficiary thereof |
| <input type="checkbox"/> Beneficiary of IRA/other retirement plan | <input type="checkbox"/> Charitable remainder trust |
| <input type="checkbox"/> Gift of real estate/securities/other property | <input type="checkbox"/> Donor advised fund |
| <input type="checkbox"/> Charitable gift annuity | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> I wish to sit with someone and learn about my options | |

Purpose of the Gift:

___ Unrestricted gift to provide maximum flexibility to Congregation Neveh Shalom and its Board of Directors to direct funds to where the need is greatest.

___ Restricted to a specific purpose: (please identify) _____

Please provide any other details you wish to share (including amount of bequest and attach the relevant portion of the instrument): _____

(All information is kept in the strictest confidence and used for internal planning purposes only.)

By: _____

Date: _____

Please return this form and any attachments to: Congregation Neveh Shalom, 2900 SW Peaceful Lane Portland, OR 97209 Attn: Fred Rothstein, Executive Director. Completion of this form is a notification of intent only and is not legally binding. Please discuss your planned giving intentions with your professional financial and legal advisors. Congregation Neveh Shalom is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Tax Identification #93-0505089.