

# Create a Jewish Legacy LEGACY GIFT CONFIRMATION

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

**legally provided for my commitment to the Create a Jewish Legacy Program of Orange County, California for the benefit of the following local institutions:**

**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                                 |

I have provided for this gift within my estate plan and confirm I have made the appropriate legal arrangements to ensure this will be accomplished on or about the time of my passing (or I have already funded a permanent endowed gift). **I 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"/> Charitable Gift Annuity                           | <input type="checkbox"/> Endowment already funded during lifetime |

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

My estate planning attorney is: \_\_\_\_\_ Phone/email: \_\_\_\_\_  
My financial planner is: \_\_\_\_\_ Phone/email: \_\_\_\_\_

**Donor name(s):** \_\_\_\_\_

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

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

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

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

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

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

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

Create a Jewish legacy is sponsored and presented by the Jewish Community Foundation of Orange County and is a collaborative effort of the local agencies, synagogues and day schools listed above.

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

If you have not already submitted confirmation of your legacy gift, PLEASE COMPLETE AND RETURN TO:

**JEWISH COMMUNITY FOUNDATION ORANGE COUNTY**

**1 Federation Way, Suite 210, Irvine, California 92603 | PH: 949.435.3490 | FAX: 949.435.3499 | www.jcfoc.org | info@jcfoc.org**