

Legacy Provision Form

CONFIDENTIAL

This document will provide a basis for credit given for your proposed gift and recognition in the Foundation's Legacy Society, one of our Foundation's most prestigious donor honorary organizations.

Name: _____

Spouse: _____

Mailing address:

Telephone: _____ Date of birth: _____

Spouse's date of birth: _____

Name/Address of your estate advisor _____

TYPE OF PROVISION

I have included a specific or residual provision for the Foundation – Jewish Communities of Western CT, Inc. in my estate plan as follows:

a. Residuary Bequest; estimate of present value \$ _____

b. Outright Bequest of specific amount or asset \$ _____

c. Outright Bequest in my spouse's estate plan \$ _____

d. Bequest in my Will if my spouse predeceases me and a similar \$ _____

bequest in my spouse's Will if I predecease my spouse

e. Trust arrangement with the Foundation as the remainder beneficiary

_____ age: _____

_____ age: _____

Foundation percentage remainder interest _____ % \$ _____

Current trustee: _____

f. Designation of the Foundation as beneficiary of my qualified retirement plan

[IRA, 403(b), 401(k)] \$ _____

g. Other (please describe): _____ \$ _____

TOTAL \$ _____