

Sample Bequest Wording

I give and devise to the Foundation - Jewish Communities of Western CT, Inc., located in Southbury, Connecticut, my entire residual estate (or _____ percent of my residuary estate, or _____ dollars, or a specific item) to create the "Donor X endowment fund".
Income from the fund shall be used to support the mission of the Foundation.

It is helpful for the Foundation to have in its confidential files a copy of the excerpts from your estate documents that pertain to your charitable gift provision.

PURPOSE OF GIFT

- Gifts may be unrestricted for use by the entire organization or for a specific area.
- Gifts may be restricted
- Please discuss any specific restrictions with Foundation staff so we can assure the best possible use of your gift.

Please indicate below how you would like your gift to be used.

GIFT RECOGNITION

- I wish to have my bequest to the Foundation remain anonymous.
- I wish to have my bequest recognized in any marketing materials the Foundation deems appropriate under the following name(s). (Please print)

Signature

Date

Please return to:

The Foundation – Jewish Communities of Western CT, Inc.
Attn: Executive Director; 444 Main Street North, Southbury, CT 06488
Phone 203-267-3177 Ext. 104 Fax: 203-267-3392

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 \$ _____