



Bequest Confirmation Form

We are grateful for your commitment to Congregation Shaare Emeth and your plans to leave a bequest to the temple to ensure support for ongoing and future needs.

This Bequest Confirmation Form is not a legal document and may be changed at the donor's discretion. It simply serves as a way for us to appreciate and recognize your generosity, and have accurate information as to your intentions and wishes.

Donor Information:

Professional Advisor Name

Phone Number

Type of Bequest:

It is my/our intent to leave a legacy to Congregation Shaare Emeth through my/our:

- ☐ Will
 ☐ Retirement Plan Assets
 ☐ Life Insurance Policy
 ☐ Living Trust
- ☐ Percentage of my Estate
 ☐ Specific Dollar Amount
- ☐ Other _____

Optional Value Statement:

I/we wish to inform Congregation Shaare Emeth, for long-term planning purposes only, that as of this date, the value of my/our gift is: \$_____. *(If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.)* I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and I may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. *(Congregation Shaare Emeth respectfully requests notification of changes or adjustments to your gift.)*

Charitable Use:

- ☐ My/Our Bequest is Unrestricted.
- ☐ It is my/our intention that my bequest be used for the following purpose(s): _____

Donor Acknowledgement

- ☐ I/we understand that listing this gift may be an incentive for others to give, and I/we are willing to be publicly acknowledged. I/we wish my/our names to appear as: _____.
- ☐ I/we prefer to remain anonymous.

Donor Signature

Date

Donor(s) Signature