



# CREATE A JEWISH LEGACY

## DECLARATION OF INTENT

In honor of my/our values and traditions, I/we declare my/our intent to help provide for the future needs of the Jewish community of South Palm Beach County for future generations through a legacy gift.

- I/we have already made a legacy provision in my/our estate plan.
- I/we intend to Create a Jewish Legacy and will formalize my/our gift within \_\_\_\_ months (up to 12) of signing this Declaration.

PLEASE PRINT

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Day Phone \_\_\_\_\_ Email Address \_\_\_\_\_

Birthday(s) \_\_\_\_\_

For future generations, I/we intend to Create a Jewish Legacy through (check one or more):

- Bequest
- Gift of Real Estate, Securities, other property
- To be determined
- Donor Advised Fund
- Retirement Plan Assets (IRA)
- Other (please specify) \_\_\_\_\_
- Life Insurance
- Lifetime Income Vehicle

The approximate value of my/our commitment will be \$ \_\_\_\_\_ or \_\_\_\_\_ % of my/our estate, life insurance or IRA.

- To encourage others to make commitments to the future, I/we permit my/our names to be listed.

My/our name(s) should appear as: \_\_\_\_\_

*Please Print Clearly*

- I/we would like my/our gift to remain anonymous at this time.

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

Please continue on back...



JEWISHBOCA.ORG / CJL





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Donor Name:

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## DECLARATION OF INTENT (continued...)

The following Create a Jewish Legacy organizations are participating in the LIFE & LEGACY initiative, which qualifies them for incentive grants and consulting benefits. I/we want the following organization(s) to benefit from my/our legacy gift:

- |   |  |
|---|--|
| <input type="radio"/> Adolph & Rose Levis Jewish Community Center | <input type="radio"/> Jewish Federation of South Palm Beach County |
| <input type="radio"/> B'nai Torah Congregation                    | <input type="radio"/> Katz Hillel Day School of Boca Raton         |
| <input type="radio"/> Boca Raton Synagogue                        | <input type="radio"/> Ruth & Norman Rales Jewish Family Services   |
| <input type="radio"/> Congregation Shaarei Kodesh                 | <input type="radio"/> Temple Beth El of Boca Raton                 |
| <input type="radio"/> Donna Klein Jewish Academy                  | <input type="radio"/> Yeshiva High School                          |
| <input type="radio"/> Jewish Association for Residential Care     |  |

These Create a Jewish Legacy organizations are not participating in the LIFE & LEGACY initiative, however I/we want them to benefit from my/our legacy gift:

- |  |  |
|--|--|
| <input type="radio"/> Congregation B'nai Israel                | <input type="radio"/> Torah Academy of Boca Raton                    |
| <input type="radio"/> Hillel of Broward and Palm Beach         | <input type="radio"/> Other, non-Create a Jewish Legacy organization |
| <input type="radio"/> Jewish Education Center of South Florida | <hr/>  |

I understand that this declaration of commitment is not a legal obligation and may be changed at my discretion at any time. Please return this form to:

**Jewish Federation of South Palm Beach County**  
9901 Donna Klein Blvd, Boca Raton, FL 33428  
Attn: Lottie Nilsen

For questions please contact Lottie Nilsen, Director of Foundation Community Development, 561-852-3109, [lottien@bocafed.org](mailto:lottien@bocafed.org) or visit [jewishboca.org/cjl](http://jewishboca.org/cjl).

Neither the Jewish Federation of South Palm Beach County nor the Create a Jewish Legacy participating organizations are engaged in rendering legal or tax services. Individuals considering legacy gifts should obtain the services of a professional advisor.