

Deferred Gift Notification

A. FUND NAME AND NUMBER

Donor Name

Fund Name and/or Fund Number

B. RECOMMENDERS: Do you have recommenders on your fund? Yes No **(If yes, skip section C.)**

Recommenders are people who participate on your fund during your lifetime, and upon the death of all donors, assume all the privileges that were conferred on you. Essentially, recommenders are the first line of succession. If you answered no to the above, you must complete section C. If you answered yes, only complete C if you wish to provide instructions in case the recommender on your fund predeceases you.

C. SUCCESSORS: Please indicate whom you would like to authorize as the Successor(s) on the fund. Successors, after the passing of all donors and recommenders, may recommend grant distributions and investment allocations and designate their own successors. In addition to, or in lieu of, successors you may name successor charities (see section D).

My succession plan is up to date and on file,

or I appoint the following successors:

Each Successor may act independently **OR** **Successors must act jointly**

Name

Name

*Date of birth – required for security purposes

*Date of birth – required for security purposes

Occupation

Occupation

Business name

Business name

Business address

Business address

City

State

Zip

City

State

Zip

Business phone

Business phone

Business fax

Business fax

Home address

Home address

City

State

Zip

City

State

Zip

Home phone

Home phone

Cell phone

Cell phone

Email

Email

D. SUCCESSOR CHARITY

Rather than designate a successor, you may recommend that the assets in your fund be distributed to one or more IRS-qualified public charities. Kindly provide us with your list of charities indicating the percentage of fund assets you would like distributed to each. *Please attach additional sheets if necessary.*

Please note: By law, JCF is unable to make grants to certain types of charities. Please refer to the *Policies and Procedures* booklet for grantmaking guidelines.

_____	_____
Name of organization	Name of organization
_____	_____
Federal tax id number (if known)	Federal tax id number (if known)
_____	_____
Address	Address
_____	_____
City State Zip	City State Zip
_____	_____
Percent of fund assets	Percent of fund assets

E. GIFT INTENT

In order to provide the appropriate services to help you plan your charitable legacy and fulfill your charitable goals, please tell us more about your non-binding intention to leave a bequest to your fund at JCF.

I, _____ plan to leave approximately _____ to my fund # _____ at JCF.
Name Approximate value of the gift

The gift will be made through my _____ .
Vehicle through which gift will be made (i.e. Will, CRT, IRA, Pension Plan, other)

I understand this is not legally binding and may be ammended at any time.

F. ATTORNEY INFORMATION

_____	_____	_____
Attorney's name	Firm	Phone number

G. SIGNATURES

_____	_____
Signature	Date
_____	_____
Acknowledged for Jewish Communal Fund by	Date

Please attach any specific instructions for your succession plan on a separate sheet of paper or contact Ellen Israelson at (646) 843-6883 or ellen@jcfny.org for assistance with bequests or succession planning.