



# Deferred Gift Notification to Establish a Fund

## A. YOUR INFORMATION

Name \_\_\_\_\_

Address \_\_\_\_\_

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

Daytime phone \_\_\_\_\_

Email \_\_\_\_\_

## B. NAME YOUR FUND

Please indicate how you would like your fund named. The fund will be established upon receipt of a contribution from your estate or other planned giving vehicle. Grants made from your fund are accompanied by a letter that includes the fund name, unless anonymity is requested.

Name of fund to be established upon receipt of gift \_\_\_\_\_

May we list your fund name in our Annual Report?  Yes  No

## C. DESIGNATE FUND HOLDERS

Fund-holders may recommend grant distributions, recommend investment allocations, designate recommenders and interested parties, and submit a succession plan.

Name \_\_\_\_\_

Name \_\_\_\_\_

\*Date of birth – required for security purposes \_\_\_\_\_

\*Date of birth – required for security purposes \_\_\_\_\_

Relationship to Donor \_\_\_\_\_

Relationship to Donor \_\_\_\_\_

Occupation \_\_\_\_\_

Occupation \_\_\_\_\_

Company \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Address \_\_\_\_\_

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

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

Daytime phone \_\_\_\_\_

Daytime phone \_\_\_\_\_

Email \_\_\_\_\_

Email \_\_\_\_\_



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## C. 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 establish a fund at JCF.

I, \_\_\_\_\_, plan to leave approximately \_\_\_\_\_ to establish a fund at JCF.  
Name Approximate value of 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 amended at any time.

## D. ATTORNEY INFORMATION

\_\_\_\_\_  
Attorney's Name

\_\_\_\_\_  
Firm

\_\_\_\_\_  
Phone number

## E. SUCCESSOR CHARITIES

Rather than designate a recommender, 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 grant-making 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

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Percent of fund assets

\_\_\_\_\_  
Percent of fund assets

Additional Instructions:



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## F. SIGNATURES

\_\_\_\_\_  
Signature 1

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature 2

\_\_\_\_\_  
Date

\_\_\_\_\_  
Acknowledged for Jewish Communal Fund by

\_\_\_\_\_  
Date

### How did you hear about the Jewish Communal Fund? (choose all that apply)

Advisor  JCF donor  Radio (which station? \_\_\_\_\_)  Event  Mailing  Press  Online Search  Other

Name of person who referred you (so we can send our thanks): \_\_\_\_\_