

Deferred Gift Notification to Establish a Fund

Updated May 2023



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 FUNDHOLDERS

Fundholders may recommend grant distributions, recommend investment allocations, designate Authorized Parties, and submit a Succession Plan.

Name

*Date of birth – required for security purposes

Relationship to Fundholder

Occupation

Company

Address

City

State

Zip

Daytime phone

Email

Name

*Date of birth – required for security purposes

Relationship to Fundholder

Occupation

Company

Address

City

State

Zip

Daytime phone

Email

D. 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 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.

E. ATTORNEY INFORMATION

Attorney's Name Firm Phone number

F. SUCCESSOR CHARITIES

Rather than designate a Fundholder, 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 Guide 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

Percentage of fund assets

Percentage of fund assets

Additional Instructions:

G. ACKNOWLEDGMENTS

JCF will endeavor to honor the wishes of our Fundholders, and communicate them to their desired Successors. Ultimately, however, Successors will assume the full rights and privileges granted to Fundholders, including the ability to add or remove people on the fund, update the investment allocation, and create a new succession plan for the fund.

H. 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 Fundholder Radio (which station? _____) Event Mailing Press Online Search

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