



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

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:

- Adolph & Rose Levis Jewish Community Center
- Boca Raton Synagogue
- Congregation Shaarei Kodesh
- Donna Klein Jewish Academy
- Jewish Association for Residential Care
- Jewish Federation of South Palm Beach County
- Katz Hillel Day School of Boca Raton
- Katz Yeshiva High School of South Florida
- Ruth & Norman Rales Jewish Family Services
- Temple Beth El of Boca Raton

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:

- B'nai Torah Congregation
  - Congregation B'nai Israel
  - Hillel of Broward and Palm Beach
  - Jewish Education Center of South Florida
  - Torah Academy of Boca Raton
  - Other, non-Create a Jewish Legacy organization
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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 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.