

LIFE & LEGACY LETTER OF INTENT

In the tradition of our Jewish faith, I wish to share my blessings by declaring my intent to provide for the needs of future generations.

It is with deep satisfaction that:

- I/We notify you that I/we have already made a legacy provision in my/our estate plan
- I/We shall make a provision during the next _____ month(s)

I wish to support the following institutions: (check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Beth-El Congregation | <input type="checkbox"/> Congregation Beth Shalom |
| <input type="checkbox"/> Congregation Ahavath Sholom | <input type="checkbox"/> Jewish Federation of FW & Tarrant Co. |
| <input type="checkbox"/> Congregation Beth Israel | <input type="checkbox"/> Other _____ |

With a legacy gift established through a/an:

- | | |
|--|--|
| <input type="checkbox"/> Endowment now with a current gift of cash or property | <input type="checkbox"/> Bequest in my will or trust |
| <input type="checkbox"/> Remainder of IRA or other retirement plan | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Gift of real estate, securities or other property | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Donor-Advised Fund |
| | <input type="checkbox"/> Other _____ |

Amount of Gift - Please choose one of the following two options:

- The approximate value of my/our commitment will be \$_____ or _____% of _____.
- I/We prefer to keep the details of this commitment confidential.

Privacy Statement: To encourage others to make commitments

- I/We permit my name to be listed in printed materials _____
- I/We prefer to remain anonymous. *(My name should appear as)*

Name(s): _____

Address: _____

City/State/Zip: _____

Phone: _____ Email: _____ Birthday: _____

Phone: _____ Email: _____ Birthday: _____

I understand that this letter of intent is not a legal obligation and may be changed at my discretion at any time.

Print Name _____ **Signature** _____ **Date** _____

Print Name _____ **Signature** _____ **Date** _____

Beth-El Congregation
4900 Briarhaven Road
Fort Worth, Texas 76109
817-332-7141 | www.bethelfw.org
Laurie S. Kelfer, President | 817-821-7422

Beth-El Life & Legacy Team:
Michael Appleman | 817-877-2803
Steve Katten | 817-307-7694
Howard Bellet | 817-937-4613

