

PLANNED GIFT INTENTION FORM

Establishing your Legacy

If it is your intention to provide the JCCGW with a bequest (or other future gifts) we would be honored to include you in our **Flora M. Stetson Legacy Society**. Please complete this form and return it to the JCCGW Development Department.

This is a confidential record.

This Planned Gift Intention Form is not a legally binding document. It simply serves as a means to assist us in recognizing your intended generosity.

INFORMATION ABOUT YOU:

YOUR NAME: _____ DATE OF BIRTH: _____

SPOUSE NAME: _____ DATE OF BIRTH: _____

MAILING ADDRESS: _____

PHONE: (HOME) _____ (WORK) _____

EMAIL: _____ FAX: _____

THIS SECTION IS OPTIONAL (if you are willing to provide us with the details of your plans, we thank you.)

MY PLANNED GIFT WILL BE: (please check all that apply)

- A PERCENTAGE OF MY ESTATE A SPECIFIC DOLLAR AMOUNT FROM MY ESTATE
- THE RESIDUE OF MY ESTATE LIFE INSURANCE PROCEEDS
- RETIREMENT PLAN PROCEEDS NOT KNOWN AT THIS TIME

IT IS MY INTENTION THAT MY GIFT BE USED FOR THE FOLLOWING PURPOSES

- AN UNRESTRICTED GIFT TO SUPPORT THE JCCGW A GIFT TO THE JCCGW ENDOWMENT FUND
- CREATE A NEW OR CONTRIBUTE TO AN EXISTING NAMED ENDOWMENT FUND:

UNLESS YOU INDICATE OTHERWISE, A MEMBER OF OUR STAFF WILL CALL YOU.

- I look forward to talking with you about my intended gift. I understand that listing this gift may be an incentive for others to give and I am willing to be publicly acknowledged.
- I would be happy to discuss my intended gift with you, but I prefer not to be listed or acknowledged publicly.
- Please do not contact me and do not list me or publicly acknowledge my intended gift.

SIGNATURE: _____

SIGNATURE: _____

DATE: _____

SUGGESTED LANGUAGE FOR A BEQUEST

If you would like to include the JCCGW in your will or living trust, please use our full legal name, Jewish Community Center of Greater Washington (or the JCCGW Endowment Fund). While your attorney is responsible for the legal aspects of your planning, we are pleased to provide the following language as a courtesy to prospective donors and their attorneys.

"I hereby give, devise, and bequeath _____ (a dollar amount, or all, or a percentage of the rest, residue, and remainder of my estate) to the JCCGW Endowment Fund (or the Jewish Community Center of Greater Washington) now or formerly in the City of Rockville, 6125 Montrose Road, in the State of Maryland, for its general purposes."

INFORMATION FOR A GIFT OF RETIREMENT PLAN ASSETS AND LIFE INSURANCE

Please contact your plan or policy administrator for a change of beneficiary form for retirement accounts and life insurance policies. You may need the following information:

Legal Name: Jewish Community Center of Greater Washington (or JCCGW Endowment Fund)
Address: 6125 Montrose Road, Rockville, MD 20852
Telephone: 301-881-0100
Tax ID: 53-0205921

If you have difficulty obtaining or completing your forms, please call or email Tasha Museles, Chief Development Officer, at 301.348.3815 or tmuseles@jccgw.org.

Information on this form is for general purposes only and is not intended as legal, tax or financial advice. Individual financial situations vary and the JCCGW recommends that you consult your own legal, tax and/or financial advisor.

The I.R.S. recognizes the Jewish Community Center of Greater Washington as a tax-exempt, 501(c)(3) nonprofit organization. Our federal tax ID number is 53-0205921.

A copy of the current financial statement of Jewish Community Center of Greater Washington is available. Documents and information submitted under the Maryland Solicitations Act are also available, for the cost of postage and copies, from the Maryland Secretary of State, State House, Annapolis MD 21401, (410) 974-5534.