



## L'DOR V'DOR LEGACY CIRCLE

TODAY'S DATE: \_\_\_\_\_

I want to do my share to support Congregation Beth Sholom for generations to come through CBS' Legacy Circle (EIN 94-1167429)

Therefore (check one):

- I have made a provision
- I will make a provision soon

to include a legacy gift to Congregation Beth Sholom through:

- Bequest in my will or trust
- Life Insurance policy
- Remainder of IRA and other retirement plans
- Trust
- Gift of real estate, securities
- Philanthropic Fund
- Other

If you are comfortable, please let us know the anticipated amount of your legacy gift:

\_\_\_\_\_ % of estate or specified property

or

fixed amount of \$\_\_\_\_\_.

This Letter of Intent is not a legal obligation and may be changed at my discretion at any time.

Full name:

\_\_\_\_\_

Name as you would like it to be recognized in Legacy Circle materials (if different from above):

\_\_\_\_\_

- Or check here if you would like your gift to remain anonymous and do not wish to be recognized

I am making this gift:

In honor of \_\_\_\_\_

In memory of \_\_\_\_\_

My Contact Information:

Address:

\_\_\_\_\_

City, State, Zip:

\_\_\_\_\_

Email:

\_\_\_\_\_

Phone:

\_\_\_\_\_

Contact information of named executor or professional advisor:

\_\_\_\_\_

If you are comfortable, please send a copy of the final language in your legacy gift document and a completed form to

*Executive Director*

*Congregation Beth Sholom*

*301 14<sup>th</sup> Avenue, San Francisco, CA 94118*

*give@bethsholomsf.org*