

L'Chaim New Mexico –
To Our Jewish Future

Temple Beth Shalom Letter of Intent

In honor of my values and traditions, I declare my commitment to help sustain a vibrant Jewish community for generations to come.

Please choose one:

I/We already have included a legacy gift provision in my/our estate plan.

OR

I/We shall make a legacy gift provision in my/our estate plan within the next **6 9 12** (circle one) months.

Donor Name(s) _____

Address _____

Phone(s) _____

Email(s) _____

Date(s) of Birth _____

I/We intend to make my/our gift to the Jewish community through:

- Bequest in Will or Trust
- Retirement Account
- Life Insurance Policy
- Cash
- Assets: Securities, Real Estate, Other
- Donor Advised Fund
- Other (please specify) _____

Optional: The approximate value of my/our gift will be

\$ _____ or _____%.

This commitment is not a legal obligation and may be modified at donor's discretion.

The following community partner organizations have been/will be included in my/our legacy plans:

- Congregation Albert
- Congregation B'nai Israel
- Congregation Nahalat Shalom
- HaMakom
- JCC of Greater Albuquerque
- Jewish Community Foundation of New Mexico
LIFE & LEGACY NM Opportunity Fund
- Jewish Federation of New Mexico
 - Jewish Care Program
- New Mexico Jewish Historical Society
- Temple Beth Shalom
- Other _____

I/We give permission to include my/our name(s) on a Legacy donor list to inspire and encourage others to join us.

My/our names should appear as follows: _____.

I/We prefer to remain anonymous at this time.

Donor Signature(s) _____ Date _____

Contacted by _____



Please complete and return this form to the community partner or to:

Erika Rimson, Jewish Community Foundation of New Mexico
5520 Wyoming Blvd. NE Albuquerque, NM 87109
erika@jcfnm.org 505.348.4472

www.jcfnm.org

Presented in collaboration with Jewish Federation of NM



Legacy Gift Confirmation

L'Chaim New Mexico –
To Our Jewish Future

With pride, and for the benefit of future generations, I confirm my legacy commitment to support a strong Jewish community.

Donor Name(s) _____

City _____ State: _____

I/We intend for the following organization(s) to benefit from my/our legacy endowment gift:

- Congregation Albert
- Congregation B'nai Israel
- Congregation Nahalat Shalom
- HaMakom
- JCC of Greater Albuquerque
 - Jewish Care Program
- Jewish Community Foundation of NM
LIFE & LEGACY NM Opportunity Fund
- Los Alamos Jewish Center
- New Mexico Jewish Historical Society
- Temple Beth Shalom
- Other _____

I/We confirm that I/we have made the appropriate legal arrangements for my/our legacy gift.

My/Our legacy endowment gift will be made through:

- Bequest in Will or Trust
- Beneficiary of Retirement Plan Assets (IRA, 401K, etc.)
- Beneficiary of Life Insurance Policy
- Other (please specify)

Optional:

The approximate value of my/our gift will be
\$ _____ or _____ % of my/our estate.

This gift confirmation is not a legal obligation and may be modified at donor's discretion.

Optional:

My/our attorney or advisor for estate planning is _____

Phone: _____ Email: _____

Donor Signature(s) _____

Date _____



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