



## Legacy Gift Confirmation/Formalization Form

I/We \_\_\_\_\_, of \_\_\_\_\_,  
(Name/s) (City) (State)

confirm that I/we have legally provided for my/our commitment to the Life & Legacy® Program of the Greater Phoenix community for the benefit of the following organizations, which will be held at the Center for Jewish Philanthropy of Greater Phoenix (*Jewish Community Foundation Tax ID # 47-0874376*):

### Life & Legacy Community Partner Organizations (please check all that apply):

*(You may complete multiple copies of this form to give to each benefiting organization, or you may provide additional information about your legacy gifts in the space below)*

- Hillel at ASU**
- Arizona Jewish Historical Society**
- Beth El Phoenix**
- Beth Joseph Congregation**
- Bureau of Jewish Education**
- Center for Jewish Philanthropy of Greater Phoenix**
- Congregation Or Tzion**
- East Valley Jewish Community Center**
- Gesher Disability Resources**
- Jewish Family & Children’s Service**
- Jewish Community of Sedona and the Verde Valley Synagogue**
- Jewish Free Loan**
- Minkoff Center for Jewish Genetics**
- National Council of Jewish Women Arizona**
- Pardes Jewish Day School**
- PJ Library**
- Temple Chai**
- Temple Emanuel of Tempe**
- Temple Kol Ami**
- Valley Beit Midrash**
- Valley of the Sun Jewish Community Center**
- Yeshiva High School of Arizona**

*I/We affirm that I/we have made appropriate legal arrangements to ensure this will be accomplished according to my/our wishes. My/Our legacy gift in the approximate amount of \$\_\_\_\_\_ or \_\_\_\_\_% has been acknowledged within the following document: \**

**Please use this space to provide any additional details about your legacy gift(s):**

- Last Will & Testament or Living Trust
- IRA or other Retirement Plan—Administered By: \_\_\_\_\_
- Life Insurance Policy—Insurance Company: \_\_\_\_\_
- Fund established with CJP’s Jewish Community Foundation—Name & Type: \_\_\_\_\_
- Cash Gift: Please make check payable to Jewish Community Foundation and provide name of the benefiting organization
- Charitable Remainder Trust/Charitable Lead Trust
- Charitable Gift Annuity (CGA)
- Real Estate or Business Interest
- Other (please describe): \_\_\_\_\_

**\*Please provide a copy of the pertinent pages(s) to ensure your wishes are met.**

If you have not filled out a Declaration of Commitment form, please complete the following information in this box:

**Please check all that apply:**

- I/We understand that this **commitment is revocable and may be modified at my/our discretion**. I/we endeavor to notify the recipient organization(s) accordingly.
- I/We understand that the **additional designated organization(s)** I/we choose to support will be notified of my/our gift.
- I/We would like to remain **anonymous** at this time.
- You have my permission to **recognize me/us publicly in all Life & Legacy marketing materials** (without disclosing gift details).
- I/We would like to learn more about **completing my/our page in the Endowment Book of Life**

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Names for Formal Recognition (unless otherwise note, couples listed as Wife & Husband Last Name)

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Street Address

City, State ZIP

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Home Phone

OR

Mobile Phone

Email

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Donor Signature

Date of Birth

Date

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Donor Signature

Date of Birth

Date

Assistance to provide for my legacy commitment given by (please provide as much information as possible):

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Name of my/our estate planning attorney

Contact Information

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Name of my/our financial planner

Contact Information

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Other (family member, executor, trustee)

Contact Information

**Please return this signed/dated form with accompanying documents to:**

Rachel Rabinovich, *Life & Legacy Program Director*  
**Center for Jewish Philanthropy of Greater Phoenix**  
12701 N. Scottsdale Road, Suite 202  
Scottsdale, AZ 85254  
480.481.1785 | [rrabinovich@phoenicxjp.org](mailto:rrabinovich@phoenicxjp.org)

Debbie Yunker Kail, Executive Director  
**Hillel at ASU**  
1012 S. Mill Ave. | Tempe, AZ 85281  
480.967.7563 | [debbie@hillelasu.org](mailto:debbie@hillelasu.org)

*Together, we assure Jewish tomorrows in our community. Thank you.*