

## Legacy Society of Congregation Beth Shalom

I/We wish to make this declaration of intent to Congregation Beth Shalom to help provide for the Jewish community of tomorrow.

- \_\_\_\_\_ I/We intend to leave a legacy gift.
- \_\_\_\_\_ I/We have already formalized and documented my/our legacy gift.

My/Our legacy gift in the approximate amount of \$\_\_\_\_\_ will be completed through (check one):

- Bequest/Will \_\_\_\_\_ Life Insurance \_\_\_\_\_
- Retirement Plan Assets (IRA) \_\_\_\_\_ Other \_\_\_\_\_
- \_\_\_\_\_ You can disclose our name in the Legacy Society marketing.
- \_\_\_\_\_ I/We would like the amount of our gift to remain anonymous at this time.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_ I/We prefer to have a confidential meeting with a member of the Legacy Society to discuss my/our gift.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Email and Telephone Number

Please email this form to Michael Garlin at Congregation Beth Shalom  
Email: [mgarlin@bethshalomnb.com](mailto:mgarlin@bethshalomnb.com).

Thank you for taking this meaningful step to secure a strong Jewish future.

