



Confirmation of Deferred Gift

Please return to: Bet Tzedek Legal Services ATTN: Development
 3250 Wilshire Blvd, 13th Floor, Los Angeles, CA 90010-1509

Date: _____

This form compiles necessary information for Bet Tzedek's appropriate administration of your charitable deferred gift. This confirmation of deferred gift form is a record of your intent, a donor-approved reference for future use. Thank you for your gift to support Bet Tzedek Legal Services.

Donor name (printed) _____

Donor Signature _____

Birth Date of Donor _____

This is not a binding legal document. Your signature verifies accuracy of information on the date signed. Details and monetary value of deferred gifts change over time; if possible please inform Bet Tzedek staff of substantive changes.

Donor Name (printed) _____

Donor Signature _____

Birth Date of Donor _____

Type of Gift

- | | | | | |
|---|---|----------------------------|-----------------|-------------------|
| <input type="checkbox"/> Will Bequest (please circle type) | <i>Specific Amount</i> | <i>Specific Percentage</i> | <i>Residual</i> | <i>Contingent</i> |
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Life Insurance Beneficiary | | | |
| <input type="checkbox"/> Revocable Trust | <input type="checkbox"/> Charitable Gift Annuity | | | |
| <input type="checkbox"/> Charitable Remainder Unitrust | <input type="checkbox"/> Deferred Gift Annuity | | | |
| <input type="checkbox"/> Charitable Remainder Annuity Trust | <input type="checkbox"/> Charitable Legacy Fund (donor advised) | | | |
| <input type="checkbox"/> Retirement Account Designation | <input type="checkbox"/> Other (please describe) _____ | | | |

Good Faith Estimate of the Gift Value \$ _____

Gift Purpose

- My/our gift may be used for Bet Tzedek's greatest needs
- My/our gift is designated for the following purpose(s) _____

Legacy Society

Because of your charitable intentions, you will be included as a member of the Legacy Society. Bet Tzedek created the Legacy Society to recognize donors who choose a deferred gift to support the organization in upholding its mission. You will join other donors who have established similar deferred gifts. Your name will be published among other Legacy Society listings in Bet Tzedek publications so that others may be inspired to follow your example. If you would prefer to remain anonymous (and not be listed), please check the following:

- No, I/We do not wish to be listed on the Legacy Society Honor Roll in Bet Tzedek publications. We prefer to remain anonymous. (It is the fiduciary responsibility of Bet Tzedek Legal Services to ensure our donor's confidentiality).