



JACOB'S LADDER Jewish Legacy Program



If you plan or are considering providing a legacy gift or bequest (giving or leaving personal property by a will) for Congregation B'nai Jacob, *please complete and return this confidential form.*

**This is not a legal document. It simply serves as a record
to help us recognize your generosity.**

Type of Legacy Gift:

☐ *Commitment only; not yet determined*

☐ A bequest in my will or trust (check all that apply)

☐ A percentage of my estate

☐ Retirement plan proceeds

☐ The residue of my estate

☐ Life insurance proceeds

☐ A specific dollar amount

☐ Appreciated stock or real estate

☐ A specific item of value

☐ Other: _____

Name(s) (exactly as you wish name(s) to appear in **Jacob's Ladder** list):

Recognition:

☐ I understand that listing my name may be an incentive for others to give. You may publish my name as a **Jacob's Ladder** legacy donor to Congregation B'nai Jacob.

☐ I wish to remain anonymous to the public. Please do not list my name.

Signature: _____ Date: _____

☐ I have already incorporated a **Jacob's Ladder** Legacy Gift to Congregation B'nai Jacob in my will, trust, retirement plan, or other gift instrument.

☐ I plan to finalize a Legacy Gift in (_____) (_____).

3 months 6 months

The name of my financial professional or attorney (optional): _____

Estimated Amount of Legacy Gift (Optional):

I estimate that the amount of my gift (*confidential; for record-keeping purposes only*) will be: _____

Thank you!

Jacob's Ladder Team