

Congregation Bet Ha'am

Office of Planned Giving
81 Westbrook Street
South Portland, ME 04106

Letter of Intent for Estate Gift

I/We desire to secure the future of our Jewish community and sustain Congregation Bet Ha'am for the coming generations through a provision in my/our estate plans. I/We understand that this future commitment can be revoked or modified by me/us at any time.

Name/s (Please include all names if this is a joint gift.)

Street Address

City

State

Zip Code

Home Phone

Mobile Phone

Email

I/We have made the following provision for a legacy gift to Congregation Bet Ha'am (please check all that apply):

- I/We have included Congregation Bet Ha'am in my/our Will or Revocable Trust.
- I/We have established an income-producing gift plan for the benefit of Congregation Bet Ha'am (charitable gift annuity, charitable lead trust, charitable remainder trust, other).
- I/We have made other estate provisions naming Congregation Bet Ha'am as beneficiary (life insurance policy, retirement plan or IRA, other).

Please provide a copy of the relevant portion of the legal documents in which your gift is described, or you may provide a letter from your financial or legal adviser describing your future gift to Congregation Bet Ha'am. You may also briefly describe your planned gift for the benefit of Congregation Bet Ha'am:

I/We wish to inform Congregation Bet Ha'am, for long-term planning purposes only, that the current value of my/our future gift is: \$ _____. (If your gift is a percentage of your estate, please indicate the approximate value.)

Please indicate the area of Congregation Bet Ha'am you wish to support with your gift:

- Unrestricted (general purpose)
- Specific Fund (please indicate): _____

Please check one:

- You may publish my/our names, as listed above, as members of the L'Dor V'Dor Legacy Circle Society.
- We wish our gift to be Anonymous.

Date

Signature 1

Signature 2