

# CONFIRMATION OF COMMITMENT

In keeping with Jewish tradition, I/we wish to share my/our blessings with others.

- I/We intend to leave a legacy gift and will formalize my/our gift within \_\_\_\_\_ months.
- I/We have already included a legacy gift for the Jewish community in my/our estate plan.

My/Our legacy gift in the approximate amount of (\$ or %) \_\_\_\_\_ to the Tidewater Jewish community will be/was completed through (check one or more):

- Life Insurance
- Charitable Remainder/Lead Trust
- Retirement Plan Assets/IRA
- Bequest/Will
- Other \_\_\_\_\_
- Real Estate or Business Interest

NAME	DATE OF BIRTH
ADDITIONAL NAME	DATE OF BIRTH
NAME(S) FOR FORMAL RECOGNITION	
ADDRESS	
HOME PHONE	MOBILE PHONE
EMAIL ADDRESS	

- You have my/our permission to recognize me/us in the *Simon Family Legacy Society Book of Life*.
- I/We would like my/our gift to remain anonymous at this time.
- Please have a TJF staff member contact me/us for a confidential conversation regarding my/our legacy gift, whether or not it has been fully executed.

*I/we understand that this commitment does not create a legal obligation and may be modified at my/our discretion.*

DONOR SIGNATURE	DATE
ADDITIONAL DONOR SIGNATURE	DATE

**It is my/our desire that the following Life & Legacy approved organization(s) benefit from my/our gift:**

- | (Check one or more)  | % or Amount (optional) |
|--|------------------------|
| <input type="checkbox"/> Beth Sholom Village                   | <input type="text"/>   |
| <input type="checkbox"/> Chabad Lubavitch of Tidewater         | <input type="text"/>   |
| <input type="checkbox"/> Congregation Beth El                  | <input type="text"/>   |
| <input type="checkbox"/> Hebrew Academy of Tidewater           | <input type="text"/>   |
| <input type="checkbox"/> Jewish Family Service of Tidewater    | <input type="text"/>   |
| <input type="checkbox"/> Ohef Sholom Temple                    | <input type="text"/>   |
| <input type="checkbox"/> Simon Family JCC                      | <input type="text"/>   |
| <input type="checkbox"/> Temple Emanuel                        | <input type="text"/>   |
| <input type="checkbox"/> Tidewater Jewish Foundation           | <input type="text"/>   |
| <input type="checkbox"/> Toras Chaim Day School                | <input type="text"/>   |
| <input type="checkbox"/> United Jewish Federation Of Tidewater | <input type="text"/>   |
| <input type="checkbox"/> Other                                 | <input type="text"/>   |

**Please return this form to:**  
**Tidewater Jewish Foundation**  
**5000 Corporate Woods Drive,**  
**Suite 200**  
**Virginia Beach, VA 23462**

**Attention:**  
**Scott Kaplan**  
**President & CEO**  
**skaplan@ujft.org**



# GIVING OPTIONS

## WAYS TO ASSURE JEWISH TOMORROWS

### *Have you considered making a lasting gift to **YOUR** Jewish community?*

The goal of planned giving is to help you plan your estate and charitable giving in a way that benefits you, your family and charity. There are many ways you can make these planned gifts and enjoy tax and income benefits.

YOUR GIFT	YOUR GOAL	HOW IT WORKS	YOUR BENEFITS
<b>BEQUEST OR LIVING TRUST</b>	<ul style="list-style-type: none"> <li>Make a revocable gift to charity and defer the transfer of assets until after your lifetime</li> </ul>	<ul style="list-style-type: none"> <li>Name TJF (and/or an Affiliate) in your will or living trust designating a specific dollar amount, percentage or share of the residual estate</li> </ul>	<ul style="list-style-type: none"> <li>Maintain control of your assets during your lifetime</li> <li>Avoid or reduce federal estate tax</li> </ul>
<b>IRA OR RETIREMENT PLAN DESIGNATION</b>	<ul style="list-style-type: none"> <li>Make a revocable gift to charity after your lifetime</li> <li>Avoid paying taxes on IRAs or other retirement assets left to heirs</li> </ul>	<ul style="list-style-type: none"> <li>Name TJF (and/or affiliate) as beneficiary of your retirement account to be distributed after your lifetime</li> <li>Complete a Change of Beneficiary form, no cost involved</li> </ul>	<ul style="list-style-type: none"> <li>Avoid multiple layers of federal and state taxes that would be due if you left assets to heirs</li> <li>Lifetime use of asset or income</li> </ul>
<b>LIFE INSURANCE</b>	<ul style="list-style-type: none"> <li>Make a future gift of a specific amount, with reduced cash outlay to support a larger after lifetime gift</li> </ul>	<ul style="list-style-type: none"> <li>Purchase a new policy (or transfer an existing policy you no longer need*) and name TJF and/or Affiliate as owner and or beneficiary</li> </ul>	<ul style="list-style-type: none"> <li>Current income tax deduction for premiums donated or cash value* of existing policy</li> <li>Make larger gift than you thought possible</li> </ul>
<b>CHARITABLE REMAINDER TRUST (CRT)</b>	<ul style="list-style-type: none"> <li>Secure a stream of income for life (or a term of years) for you or family member(s) and leave remainder of asset to charity</li> </ul>	<ul style="list-style-type: none"> <li>Transfer cash or appreciated property to fund a charitable trust that provides you or family member(s) with income for life or a term of years.</li> <li>Remainder of asset is left to charity</li> </ul>	<ul style="list-style-type: none"> <li>Receive income for life or terms of years</li> <li>Receive an immediate income tax deduction</li> <li>Avoidance of capital gains tax as asset is removed from your estate</li> </ul>
<b>CHARITABLE LEAD TRUST (CLT)</b>	<ul style="list-style-type: none"> <li>Reduce gift and estate taxes on assets you pass to children or grandchildren</li> <li>Provide income (gift) to charity for life (or term of years) and pass on asset to family</li> </ul>	<ul style="list-style-type: none"> <li>Transfer cash or property to create a trust that makes gifts to TJF and/or Affiliate for a number of years; the principal is retained for your family at substantial tax savings</li> </ul>	<ul style="list-style-type: none"> <li>Gift or estate tax deduction</li> <li>Family keeps the asset and appreciation with reduced gift and estate taxes</li> </ul>
<b>LIFE ESTATE RESERVED</b>	<ul style="list-style-type: none"> <li>Remain in your home for life</li> <li>Provide future gift to charity without giving up the asset during your life</li> <li>Receive a current charitable income tax deduction</li> </ul>	<ul style="list-style-type: none"> <li>Deed/gift your home to TJF and retain the right to use the property during your life</li> <li>Pay maintenance, insurance, and property taxes as you do currently</li> <li>After your lifetime, property is sold and charity receives the proceeds</li> </ul>	<ul style="list-style-type: none"> <li>Receive a current federal income tax deduction for the value of the remainder interest in your home</li> <li>Maintain lifetime use of your home</li> </ul>

### For more information, please contact:

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*President and CEO*  
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 757-965-6111 • [skaplan@ujft.org](mailto:skaplan@ujft.org)  
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