



Legacy Giving

JFS Legacy Society Enrollment Form

FIRST & LAST NAME

SPOUSE - FIRST & LAST NAME

ADDRESS

CITY

STATE

ZIP

PHONE

EMAIL

You will receive periodic email updates from Jewish Family Service of San Diego. We will not rent, sell, or share your information.

BIRTHDATE

SPOUSE - BIRTHDATE

By making this gift, you become a member of the **JFS Legacy Society**. In an effort to inspire others to make similar gifts, we like to list Legacy Society members in our publications from time to time.

List name(s) as: _____

I prefer to remain anonymous.

Optional Information: We wish to ensure that all information on this statement of intention does not constitute a legal obligation. Jewish Family Service of San Diego understands that the size of your future gift may be significantly different from the amount estimated below. If you make any changes to your provision, please notify us so that we may update our records.

Type of Bequest:

Please check all that apply and estimate the value of each gift in today's dollars. If you have named JFSSD as a percentage beneficiary, please indicate the approximate dollar value of JFSSD's percentage.

Will or Trust: \$ _____

Retirement plan/IRA: \$ _____

Insurance policy: \$ _____

Other asset: \$ _____

Real estate: \$ _____

Please describe: _____

Charitable remainder trust: \$ _____

SIGNATURE 1 _____ **DATE** _____

SIGNATURE 2 _____ **DATE** _____

Questions?

Contact Lacey Lee at (858) 637-3217 or email laceyl@jfssd.org
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