

# LEGACY SOCIETY COMMITMENT FORM

COMPASSION IN ACTION. COMMITMENT TO ALL.

I/we wish to join Jewish Family & Community Services East Bay's Legacy Society to ensure that future generations will inherit a healthy and strong community, anchored by institutions that care for people in need, grounded in an abiding commitment to heal the world. My/our legacy gift honors the core belief that generosity and kindness are essential to the fabric of our community.

While not a legal document, this document indicates my/our commitment to include a gift in my/our estate plan as specified below:

**I/we have already made a legacy provision in my/our estate plan.**

**I/we commit to formalizing a legacy gift with 12 months of signing this form.**

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email Address \_\_\_\_\_

**I/we intend to leave a legacy gift in the form of (select one or more):**

Bequest in will or trust

Gift of real estate, securities, or other property

Retirement plan assets

To be determined

Life insurance

The approximate value of my/our commitment will be \$ \_\_\_\_\_ or \_\_\_\_\_% of my/our estate. *(Optional)*

## Recognition preferences

To encourage others to make similar commitments, I/we give permission to publish my/our name(s). Please publish my/our name(s) as: \_\_\_\_\_

I/we prefer to be anonymous.

\_\_\_\_\_  
Donor Signature(s)

\_\_\_\_\_  
Date

**As a member of JFCS East Bay's Legacy Society, you will be entitled to the following benefits:**

- Invitations to special appreciation events.
- Special updates from our Executive Director.
- Recognition in agency publications.
- Contributing to the long-term strength of our community.

**Please return this form via mail or email to:**

Courteney Coolidge  
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Berkeley, CA 94704  
ccoolidge@jfcs-eastbay.org / (510) 704-7480, ext. 760



**JEWISH FAMILY &  
COMMUNITY SERVICES**  
EAST BAY