

Letter of Intent

Congregation Beth Shalom Legacy Circle

Thank you for considering Congregation Beth Shalom in your will or estate plans. This form is provided to notify Congregation Beth Shalom that you have made a provision in your will or estate plan for the synagogue. This is not a legal document and is not legally binding.

I/We have made provisions for Congregation Beth Shalom in my/our estate plans.

Name(s): _____

Address: _____

Email: _____ Phone #: _____

I/We have included Congregation Beth Shalom in my/our estate plan by a:

- _____ Bequest in a will or trust
- _____ Beneficiary of IRA or a 401(k) or 403(b) retirement plan
- _____ Beneficiary of a life insurance policy
- _____ Beneficiary of a Donor-advised fund
- _____ Charitable Gift Annuity
- _____ Charitable Remainder Trust
- _____ Charitable Lead Trust
- _____ Interest in Real Estate

The Congregation Beth Shalom purpose or programs we wish our gift to support are:

**Please Select One*

- _____ Worship and spirituality
- _____ Jewish education
- _____ Community and social justice

The current value of this gift is:

- _____ Approximately \$ _____
- _____ I/We do not know the value.
- _____ I/We do not wish to disclose the value.

On the listing of Legacy Circle donors, my/our name(s) should appear as:

☐ I/We do not wish my/our name(s) to appear on any public roster or plaque and prefer to remain anonymous.

May we contact you personally to further discuss your gift intentions?
All conversations and information will be held in the strictest confidence.

Please Choose One

☐ Yes

☐ No

Please mail or bring to:

***Congregation Beth Shalom
1455 Elm St
Napa, CA 94559***