



# Legacy Agreement

Creating a Jewish legacy confirms my commitment to support the Jewish organizations that have been important in my life and will ensure their strength for future generations.

Name:

Birthdate:

Name:

Birthdate:

Address:

City:

Province:

Postal Code:

Phone:

Email:

I/We have already included a legacy gift for the Jewish community in my/our estate plan.

I/We shall make a provision in my/our estate plan within the next (check one box):

3 months

6 months

9 months

12 months

I/We wish to set up my/our legacy as follows:

Federation CJA Perpetual Annual Campaign Endowment

Federation CJA Lion of Judah Endowment (minimum \$100,000)

Federation CJA Endowment for Impact area of your choice:

An Endowment, through Federation CJA, designated to:

Please identify the vehicle(s) through which you plan to create your legacy gift (check all that apply):

Gift in Will

Cash

Life Insurance Policy

Assets: Stocks, Real Estate, etc.

Charitable Remainder Trust

Other:

My/our commitment will be \$ \_\_\_\_\_ made through the vehicle(s) denoted above.

OR

My/our commitment will be % \_\_\_\_\_ of my/ our estate or life insurance policy as denoted above. I/we estimate it has a value of \$ \_\_\_\_\_

Additional instructions regarding your gift:

I/we wish to be listed in all Legacy recognition pieces for Federation CJA.

Please provide the exact name you wish to have listed in donor recognition materials / installations:

I/We wish to remain anonymous at this time.

Donor Signature

Date

Date

***This agreement is part of the Life & Legacy program of FCJA, JCF and the HGF.***

***I/we understand that this legacy gift will be placed into a permanent endowment fund held by the Jewish Community Foundation of Montreal on behalf of Federation CJA.***

***I/we understand that my/our commitment is not a legal obligation and can be changed at my/our discretion.***

***For more information please email [legacy@federationcja.org](mailto:legacy@federationcja.org)***