

# B'NAI TORAH FOUNDATION

6261 SW 18th Street  
Boca Raton, Florida 33433  
561-392-8566

## CONFIDENTIAL LEGACY FORM

Name(s)

Address:

Date of Birth:

Telephone:

Spouse's Date of Birth:

I have made provision to B'nai Torah Foundation in my estate planning as follows:

	<u>TYPE OF PROVISION</u>	<u>ESTIMATED AMOUNT</u>
A:	Outright bequest in my will.	\$ _____
B:	Provision in the will of the survivor of husband (wife) and myself.	
C:	Life Insurance Policy (revocable\irrevocable)\$ _____	
D:	Trust under my will with B'nai Torah Foundation the final beneficiary (please include date of birth of income beneficiaries or describe other conditions, name of trustee and/or personal representative): _____ _____ _____	
E:	IRA or pension	\$ _____
F:	Charitable Lead or Remainder Trust\Other (please describe)	

**I do/I do not** give permission to have my name appear in B'nai Torah publications regarding my legacy gift.

### TOTAL

(Attachments of letters which further describe the nature of the above provision(s) are welcomed in addition to that section of the will or trust in which our institution is mentioned.)

In the event of unforeseen circumstances that require any further change in the above estate planning provision(s), I agree to notify B'nai Torah Foundation of such change.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_