



Central Reform Congregation

A Jewish presence in the City of St. Louis

You too may create a Legacy with a planned gift to Central Reform Congregation
"As my parents planted for me before I was born, so do I plant for those who will come after me." -Talmud

Your legacy gift will help preserve your values and impact the future by ensuring that Central Reform Congregation (CRC) remains an intentional and inclusive Jewish community in the city of St. Louis. Creating a bequest or other planned gift to benefit CRC is easy. Consider a planned gift and look at the options available to help you meet your goals by discussing this with your family, attorney, tax advisor or financial planner. Two options to consider are a bequest through your will or a gift from an insurance policy or retirement account.

A Will to Give

A will or living trust helps your loved ones manage your assets after your passing. Without one, those closest to you will endure unnecessary stress and anxiety because you have not shared your intentions with them in writing. With a will, you provide for the individuals and causes you care about now. With a will, you can:

- Direct the division of your property the way you choose, not the way the state decides.
- Make special arrangements for family members who are minors, disabled or unfamiliar with managing money.
- Select an executor who is qualified to administer your estate promptly and economically with careful attention to your wishes.
- Support charitable organizations and causes that are important to you, such as CRC.

Retirement Accounts and Insurance Policies

If an insurance policy or retirement savings are part of what your loved ones will inherit, there is an easy way to benefit both your heirs and CRC or another charity. You may split your retirement plan assets and life insurance policy benefits among your heirs and designate a percentage to support CRC.

These are the three easy steps to take to make a gift from an insurance policy or retirement account:

1. Contact your insurance company or retirement account administrator and request a change of beneficiary form.
2. Decide what percentage of the policy or account's value you wish to leave to each heir and to CRC and name each heir and CRC along with the percentage on the beneficiary form.
3. Return the form to your insurance company or plan administrator.

To be certain that your gift will meet your goals, always discuss your plans with a professional advisor. As I/we look toward the future, I/we take deep satisfaction in declaring my/our intent to ensure that what we have built at CRC will last. By including CRC as a beneficiary of my/our estate planning, I/we will ensure that our shared values of Judaism, holy community, and tikkun olam will endure and prosper.

It is with deep satisfaction that I/we:

- Have made provisions
- Will make provisions

To support Central Reform Congregation

This gift will be funded through a:

- Bequest in my/our will
- Charitable gift annuity
- Charitable remainder trust
- Donor advised fund
- Gift of real estate, securities or other property
- Life insurance policy
- Remainder of an IRA or other retirement plan
- Other: _____

The approximate value of my/our commitment will be:

\$_____ OR _____% of my/our estate

Additional information about the gift:

Name(s) _____

Address _____

City, State, Zip _____

Phone _____

Email _____

Date of Birth _____

To encourage others to make commitments to the future, I/we permit my/our name to be listed in printed materials and other recognition vehicles. My/our names should appear as:

I/we prefer to remain anonymous

I/we understand that this letter of intent is not a legal obligation and may change at my/our discretion. It is supplemental to our annual and special gifts and pledges already made or yet to be made by myself/us and others, and not a substitute for such support.

Signature

Date

Signature

Date

To submit digitally: Please fill out the form, type your full name on the signature line, and email the form to nancy@centralreform.org.

To submit a hard copy: Print the form, sign it, and mail it to:

Central Reform Congregation
ATTN: Nancy Weigley
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St. Louis, MO 63108