



Declaration of Intent to Establish a Legacy Gift

We are deeply grateful for your legacy gift. By sharing your intent to include The Hebrew Free Loan Society of New York in your plans, you join a community dedicated to helping provide access to safe capital for generations to come. **Completing this form does not constitute a legal obligation.** Details of your plans will remain strictly confidential.

GIFT PLANS: I/we:

have included or **intend to include** The Hebrew Free Loan Society of New York in our estate plans through:

A will or living trust

Other estate provisions naming The Hebrew Free Loan Society of New York as beneficiary

(bank account, insurance policy, retirement benefits, other)

(Optional) The approximate value of my/our legacy gift is _____.

We ask for this amount only to help project the future benefits of legacy gifts for budgetary purposes and will remain strictly confidential.

RECOGNITION: We honor donors of legacy gifts by membership in the Legacy Society. Please check below to indicate whether we may include you in public recognition to encourage others to make similar gifts.

I/we would be pleased to be listed in the Legacy Society. The name(s) will appear as listed below. The terms of my gift will remain confidential.

I/we prefer anonymous membership in the Legacy Society.

CONTACT INFORMATION:

Name(s) _____ Date of Birth _____

_____ Date of Birth _____

Address _____

City _____ State _____ ZIP Code _____

Phone _____ E-mail _____

Signature(s) _____

Date _____