



## JFS Legacy Gift Intention Form

***In appreciation and support of the work of Jewish Family Services of St. Louis (JFS), it is my/our intention to make a legacy gift through our estate plan to support JFS' mission for generations to come. I/We understand this document is not legally binding, but that my/our intention will help JFS understand my/our wishes and plan for the future.***

Name	Birthdate	
Spouse Name	Birthdate	
City	State	Zip
Phone #	Email	

***A gift has been provided for the benefit of the JFS through the following:***

- Will or Living Trust       Retirement Plan Assets       Real Estate  
 Annuity       Life Insurance Policy       Charitable Remainder Trust  
 Other (please explain): \_\_\_\_\_

The current estimated amount of my/our gift (optional): \_\_\_\_\_

***JFS' policy is to add bequests and estate gifts to its unrestricted endowment, providing maximum flexibility for JFS to pursue its mission. If you prefer to allocate your bequest or estate gift towards a restricted use, please let us know and we will contact you to ensure we can honor your intention.***

- I would like my gift to JFS to be unrestricted.  
 My gift is already designated for the following fund or purpose: \_\_\_\_\_  
 Please let me know how to designate my gift for the following fund or purpose: \_\_\_\_\_

***Donors who provide a planned gift to benefit JFS will be recognized as part of the Legacy Society.***

- I/We prefer no public recognition.  
 Please list my/our name(s) as follows: \_\_\_\_\_

Please complete the reverse side of this form.



**Documentation**

Attached is a copy of the relevant portions of the legal documents relating to my/our future gift to the JFS or a letter from my legal or financial advisor that describes the nature and purpose of the gift (optional but helps the JFS with future planning).

***Estate Contact Information: Although optional, the following information is very helpful.***

- Executor, Trustee (if your gift is through a Will, Trust):
- Administrating Company (ie. TIAA, Fidelity, etc., if your gift is through a retirement account or life insurance policy):

---

Contact Name	Company (if applicable)	
City	State	Zip
Phone #	Email	

***Signatures (non-binding)***

---

Name	Date
Name	Date

Please contact me/us to learn more about why I/we have chosen to make a legacy gift to JFS.

**THANK YOU for sharing details regarding your long-term financial plans to support JFS.  
All information disclosed will remain confidential.**

**For questions, please contact Elizabeth Macanufu at [emacanufu@jfsstl.org](mailto:emacanufu@jfsstl.org) or 314-812-9363.**

**For more information on planned giving opportunities, please visit our website: [www.jfsstl.org](http://www.jfsstl.org)**

**Please return this completed form to:**

JFS of St. Louis  
Attn: Development Office  
10950 Schuetz Road  
St. Louis, MO 63146