



Bushman Community Endowment Program

Planned Gift Reporting Form

(Please return to Diane Azorsky at the Jewish Community Foundation)

Organization name: _____

Name of Donor/s: _____

Address: _____

Phone number: _____ E-mail: _____

Place an **X** next to the type of gift:

<input type="checkbox"/>	Bequest in a will or trust	<input type="checkbox"/>	Charitable Gift Annuity
<input type="checkbox"/>	Outright gift	<input type="checkbox"/>	Charitable Remainder Trust
<input type="checkbox"/>	Retirement Plan beneficiary designation	<input type="checkbox"/>	Other (please describe below)
<input type="checkbox"/>	Life Insurance policy	<input type="checkbox"/>	

Description of gift (e.g. type of bequest, insurance policy or Gift Annuity; cash, real estate, etc):

Best estimate of the value of this gift \$ _____

Restrictions as to use of this gift : _____

Payout formula (%): _____ Access to principal? _____

Has the donor provided legal documentation of the gift? _____ If yes, please attach a copy.

If no, how was the donor's intention communicated to you? _____

May we publicize your donor's gift intentions? _____

Signed

Date

For Foundation Use Only:

FIMS Setup – Promises

Solicitor: _____

Purpose: _____

Gift Type: _____

Source: _____

BCE Participant: _____

FIMS Set-up – Fund

(if applicable)

Fund Type: _____

Donor Recognition

Donor Wall Eligible: _____

Book of Life Eligible: _____

Strictly Confidential: _____