



What Will My Jewish Legacy Be?

Legacy Gift Plan Worksheet

Our Legacy Plan Worksheet is a tool to help you think about your charitable legacy in the community. What are you most passionate about in the community? If you thought of the community like it was one of your children, how would you want it to be cared for? Use this worksheet to help you think through what's really important to you, and use that to design your legacy plan.

1. Present Support

What charitable organizations do you give to now? Specify any specific programs you give to at these organizations. Attach additional pages as necessary.

2. Importance

Of these organizations and programs, think about the ones that are most important—and meaningful—to you. Place check marks next to them on the list above.

3. “Causes”

Using the above list, would you say that there are any “causes”, or areas of interest, that you support? If so, what are they?

4. Reasons for Giving

Why do you give to the organizations and causes you support? Feel free to draw upon your history, your family's history, opinions, feelings, and most importantly, your beliefs.

5. Themes and Values

Would you say that there are any "themes"—or sets of values—that tie together the organizations and/or causes you support? If so, what are they?

6. Vision

What kind of world would like to see in 50 years? Feel free to draw upon themes and values.

7. Other

What else is important to you when you think about leaving a legacy for future generations?

8. Legacy Gift Plans

Based upon your vision, values, causes and organizations you support, make a list that represents the organizations, programs and causes that you would support in a legacy gift to the community.

Be as specific (e.g., "Jewish Music Festival") or as general (e.g., "the Jewish community") as you want. Add percentages to reflect the relative importance of your support.

You don't have to "get it right" the first time; feel free to redo this list as many times as you need.

Notes

Create a Jewish Legacy Legacy Gift Plan Worksheet