



LEGACY GIFT INTENTION FORM

In appreciation and support of Temple Emanuel of Andover, it is my/our intention to make a legacy gift through my/our estate plan to support Temple Emanuel's mission for generations to come and become a member of the Eternal Light Society. I/we understand this document is not legally binding, but that my/our intention will help Temple Emanuel understand my/our wishes and plan for the future.

Donor Information

Name(s): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____ Phone: _____

Gift Intention

A gift has been provided for the benefit of Temple Emanuel through the following:

- ☐ Will or living trust bequest
- ☐ Retirement plan beneficiary provision
- ☐ Life insurance policy beneficiary provision
- ☐ Donor-advised fund beneficiary provision

Estimated gift amount (optional): \$_____

Please add any other details you wish to share: _____

When you include Temple Emanuel in your plans, please use our legal name and federal tax ID.

Legal Name: Congregation Temple Emanuel of Andover, Massachusetts

Tax ID Number: 04-2104033



Recognition Preferences

- ☐ Please publish my/our name in the Eternal Light Society as:

- ☐ I/we wish to remain anonymous and request that my/our name(s) not be published.

Documentation (optional, but helps Temple Emanuel with future planning)

- ☐ Attached is a copy of the relevant portions of the legal documents relating to my/our future gift to Temple Emanuel or a letter from my legal or financial advisor that describes the nature and purpose of the gift.

Estate Contact Information (optional)

- ☐ Executor, Trustee (if your gift is through a will or trust)
- ☐ Administering Company (if your gift is through a retirement account, life insurance policy or donor-advised fund)

Contact Name: _____

Company (if applicable): _____

City: _____ State: _____ Zip Code: _____

Email: _____ Phone: _____

Signature(s) (non-binding):

Signature _____

Printed Name: _____ Date: _____

Signature _____

Printed Name: _____ Date: _____

If you have questions or would like more information on planned giving opportunities, please contact Michelle Gamliel, Executive Director, at 978-470-1356 or email plannedgiving@templemanuel.net.

Please return this completed form to:

Attn: Executive Director
Temple Emanuel
7 Haggetts Pond Road
Andover, MA 01810

Thank you for your generous and thoughtful commitment to the future of Temple Emanuel. All information disclosed will remain confidential.