Centennial Campaign Countdown

Bequest Pledge Agreement (Restricted)

“I, ________________________, give, devise, and bequeath to Jewish Family Service:

Type of Gift:                        Approximate Value:
  □ Bequest in a Will/Living Trust      ______________________
  □ Beneficiary of IRA/Retirement Account/Insurance Policy  ______________________
  □ Bank/Brokerage, or Other Financial Account    ______________________
  □ Charitable Trust       ______________________
  □ Other (please specify__________________________________________

The property comprising this gift shall, for investment purposes, be merged with the general assets of the Rady Jewish Family Service Endowment Fund, to be administered pursuant to the terms and conditions applicable to such funds.

It is my understanding that my gift will be matched dollar-for-dollar from the Rady Family Foundation up to $17,000,000.

The gift shall be recorded as “____________________________” and shall always be so designated. All public recognition of this gift will be identical to the recorded name above.

The spendable income therefrom, but not the principal, shall be used to support the following program(s):

________________________________________________________  in furtherance of Jewish Family Service of San Diego’s mission to strengthen the individual, enhance the family, protect the vulnerable with human services based on Jewish values.

If, in the opinion of the CEO, CFO and the Finance Committee of the Board of Trustees of Jewish Family Service of San Diego, the need for funds for the purpose described above no longer exists at some future date, Jewish Family Service of San Diego is authorized to use these funds in the best interest of organization, subject to the terms and conditions governing the Rady Jewish Family Service Endowment Fund and provided that the identity of the donor is maintained.

This pledge may be satisfied in part or in full by payments made to the Rady Endowment Fund by me at my discretion during my lifetime and so designated by me in writing to Jewish Family Service of San Diego at the time of said gift(s). Any amounts paid by me from the date of this Agreement to the date of my death which are so designated as pledge payments applicable to this Bequest Pledge shall reduce the amount my estate is obligated to pay under the terms of this Agreement.
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I acknowledge the agency’s promise to use the amount pledged for the purposes specified, Which shall constitute full and adequate consideration for this pledge.

___________________________________________  
[Date of Birth]  

_________________________________________________  
[Name(s)]  

_____________________________________  ____________________  
[Signature]  Date  

Acknowledged and accepted on behalf of Jewish Family Service of San Diego by:

_____________________________________  ____________________  
Michael Hopkins, CEO, Jewish Family Service of San Diego  Date