Bequest Pledge Agreement (Unrestricted)

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 added to 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 future 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.

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.

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]                                            [Name(s)]

[Michael Hopkins, CEO, Jewish Family Service of San Diego]  ____________ __
[Signature]                                            [Name(s)]