

Testamentary Giving

Beth Adam's mission is to provide a unique community integrating Jewish tradition and humanistic principles. It is to be a spiritual home, a meaningful voice, and a humanistic resource for people worldwide, seeking a contemporary Jewish identity and experience.

Testamentary or Legacy gifts are a way to help future generations.

Ask your attorney to include such words as these:

Last Will and Testament -- Bequest for General Purposes

"I, (name), of (city, state) give, devise and bequeath [the sum of \$_____] {or, *alternatively*} [_____% of my remaining probate estate] to Congregation Beth Adam, an Ohio nonprofit corporation, to be used for general purposes at the discretion of the Congregation's Board of Trustees."

Last Will and Testament -- Bequest for a Specific Purpose

"I give, devise and bequeath [the sum of \$_____] {or, *alternatively*} [_____% of my remaining probate estate] to Congregation Beth Adam, an Ohio nonprofit corporation, to be used in support (insert specific designation)."

{additionally, if desired}"Provided, however, that if at any time the Congregation Beth Adam Board of Trustees should determine, at its sole discretion, that such use is impossible, impractical, or unnecessary for any reason or that all or part of the assets received are no longer needed for such use or purpose, then the Beth Adam Board of Trustees may redirect and use any and all portions of the assets received or the resulting proceeds for other uses or purposes consistent with my general interests and charitable intent in supporting Beth Adam."

Revocable or Living Trust -- Gift for General Purposes

"Upon my death, the Trustee shall distribute cash in the amount of, or other trust property valued at, [\$_____]{or, *alternatively*} [_____% of my remaining trust estate] to Congregation Beth Adam located in Loveland, Hamilton County, Ohio for general purposes at the discretion of the Congregation's Board of Trustees."

Revocable or Living Trust -- Gift for General Purposes

“Upon my death, the Trustee shall distribute cash in the amount of, or other trust property valued at, [\$ _____] {or, *alternatively*} [_____ % of my remaining trust estate] to Congregation Beth Adam located in Loveland, Hamilton County, Ohio for general purposes at the discretion of the Congregation’s Board of Trustees.”

Revocable or Living Trust -- Gift for a Specific Purpose

“Upon my death, the Trustee shall distribute cash in the amount of, or other trust property valued at, [\$ _____] {or, *alternatively*} [_____ % of my remaining trust estate] to Congregation Beth Adam located in Loveland, Hamilton County, Ohio to be used in support (insert specific designation).”

{additionally, if desired}“Provided, however, that if at any time the Congregation Beth Adam Board of Trustees should determine, at its sole discretion, that such use is impossible, impractical, or unnecessary for any reason or that all or part of the assets received are no longer needed for such use or purpose, then the Beth Adam Board of Trustees may redirect and use any and all portions of the assets received or the resulting proceeds for other uses or purposes consistent with my general interests and charitable intent in supporting Beth Adam.”