



Estate Gift Confirmation Form

Questions?

If you have any questions about how to complete this form or would like to discuss your estate plans in greater detail, please call the Development Office at 212.294.6156.

Please return the completed form to:

YIVO Institute for
Jewish Research
Attn: Development Office
15 West 16th Street
New York, NY 10011

I am pleased to advise the YIVO Institute for Jewish Research of the following gift provision in my estate plans as indicated below:

☐ **Will or Revocable Trust**

☐ My bequest is listed as a percentage of my estate.

☐ My bequest is listed as a specific dollar amount.

☐ For couples:

My spouse's or life partner's Will contains reciprocal gift language.

☐ My bequest is in the form of property, described as _____

☐ **Retirement Plan Beneficiary Designation**

☐ **Life Insurance Beneficiary Designation**

☐ **Charitable Lead Trust**

☐ **Charitable Remainder Trust**

☐ **Charitable Gift Annuity**

Name of Executor, Trustee, or Plan Administrator:

I/We estimate the current value of this deferred gift: \$ _____

I/We wish to designate this gift as follows:

☐ The general purposes of YIVO

☐ A specific purpose (please describe): _____

For gift recognition purposes, please list my name/our names as:

☐ I/We wish to remain anonymous.

*I understand that this document does **not** represent a legal or binding commitment and that the amount listed above is an estimate. I will inform the YIVO Institute of any changes to my estate plan that impact the amount, type, or designation of my deferred gift.*

Name (please print): _____

Signature: _____ Date: _____

Spouse/Partner Name (please print): _____

Spouse/Partner Signature: _____ Date: _____

Address: _____

City: _____ State: _____ ZIP: _____