



# CHAI SOCIETY FOR LIFETIME CARE

BENEFITING COMMUNITY HOMES FOR ADULTS ENDOWMENT FOUNDATION

We express deep gratitude to CHAI donors of blessed memory whose generosity extends beyond their lifetimes through legacy giving. Their support has helped grow our endowment over the last 25 years so we are able to serve generations of CHAI residents. Though they are no longer with us, their commitment to our community endures.

Rosalie Alexander  
Margie S. August  
Sylvan T. Baer  
Katherine and Herbert Bauer  
Nanni Hogan Boyd  
Robert Cooper  
Jeanne and Tex Fagadu  
Ellen Rae Feibel  
Dorace Maritzky Fichtenbaum  
Leo and Rhea Fay Fruhman  
George Golman

Lois W. Gordon  
Greta and Howard Herskowitz  
Bernard "Bunny" Joseph  
Louise W. Kahn  
Milton P. Levy, Jr.  
Marvin and Mollyann Romick Menaker  
Carmen and Ludwig Michael  
Carmen and Henry S. Miller  
Stuart Morse  
Dolores and Walter Neustadt  
Eleanore G. Ratner

Joseph H. Seigel  
Herbert Shore  
Roy and Esther Barzune Stein  
Dorothy Todd  
Alan M. Utay  
Michael Wallace  
Harry and Jeanette Weinberg  
Ida and Kalman Wolens  
Orien Levy Woolf & Jack Woolf

Special thanks to our current supporters who have expressed their intention to make a planned gift as members of our CHAI Society for Lifetime Care.

Minnie Blackwell  
Lisa Brodsky and Beth Young  
Barbara and Larry Glazer  
Marcy Helfand

Shirley Morris  
Irene Niemotka  
Janet Protas  
David Romick and Karen Dubrow

John Rosenberg  
Beverly and Cary Rossel

## You can make a planned gift in several ways:

- In your Will or Trust, you can designate a specific dollar amount or percentage of assets to CHAI.
- You can set up a donor-advised fund (DAF) and integrate it into your estate plans
- You can name CHAI as a beneficiary of your IRA, 401(k), retirement plan, or life insurance policy

Each of these contribution methods offers different tax deductions, helping CHAI sustain its future. You can express your intent to make a planned gift with the Planned Gift Intent Form on the next page.



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# PLANNED GIFT INTENT FORM

Thank you for joining the CHAI Society for Lifetime Care. This form is intended to express your intent to make a planned gift to Community Homes for Adults, Inc. It does not legally bind you or your estate to fulfill this gift if you choose to modify or cancel your planned gift at any time. If this is a joint gift, please include name and D.O.B. for both individuals.

## DONOR INFORMATION

Name(s) \_\_\_\_\_ D.O.B. \_\_\_\_\_

Address \_\_\_\_\_ City, State, Zip \_\_\_\_\_

Email \_\_\_\_\_ Phone # \_\_\_\_\_

Name(s) as you would like to be recognized \_\_\_\_\_  
or write "anonymous" here if that is your preference

## GIFT COMMITMENT OR INTENTION (CHOOSE ONE)

I can describe how **I have placed CHAI into my estate plans**, and would like to join the CHAI Society for Lifetime Care. (Fill out "About Your Gift" section.)

At this time, **I can express my intent** to name CHAI in my estate plans in the future, and would like to join the CHAI Society for Lifetime Care. (Leave "About Your Gift" section blank.)

## REQUEST FOR GUIDANCE OR DISCUSSION (OPTIONAL)

I would like to have further conversation with CHAI and/or Dallas Jewish Community Foundation about my intent to make a planned gift or about my current financial commitment.

## ABOUT YOUR GIFT (OPTIONAL)

\_\_\_\_\_ % of my residuary estate - current estimated value of estate: \$ \_\_\_\_\_

Insurance policy beneficiary designation: \$ \_\_\_\_\_ or \_\_\_\_\_ %

Retirement plan or IRA beneficiary designation: \$ \_\_\_\_\_ or \_\_\_\_\_ %

Other - Describe gift or asset and value: \_\_\_\_\_

Information if the gift will be from a private foundation, donor advised fund, or other charitable vehicle

\_\_\_\_\_  
Name of Financial Advisor or Estate Attorney

\_\_\_\_\_  
Email or Phone Number

Questions? Contact [development@chaidallas.org](mailto:development@chaidallas.org) or call (214) 888-4909

If you intend to list Community Homes for Adults, Inc. in your will, we recommend the following language: "Community Homes for Adults, Inc., a 501(c)(3) nonprofit organization in Dallas, TX, Tax ID #75-1894451."