



As my fathers
planted for me,
so do I plant for
my children

- Taanit 23a

Legacy Best Practices

Arlene D. Schiff – November 2015
Harold Grinspoon Foundation

As of June 30, 2015

- 21 communities and 13 Hillel campus affiliates reporting
- Representing 275 organizations
- Have had just under 5,600 legacy conversations and made more than 1,000 group presentations
- Resulting in **5,877 legacy commitments of which more than 1100 have been formalized**
- With an **estimated value of \$224 M in future gifts** to the Jewish community
- More than \$16 M realized to date
- **Thank you for being part of our success!**

As of November 17,

305 Letters of Intent signed

483 total commitments

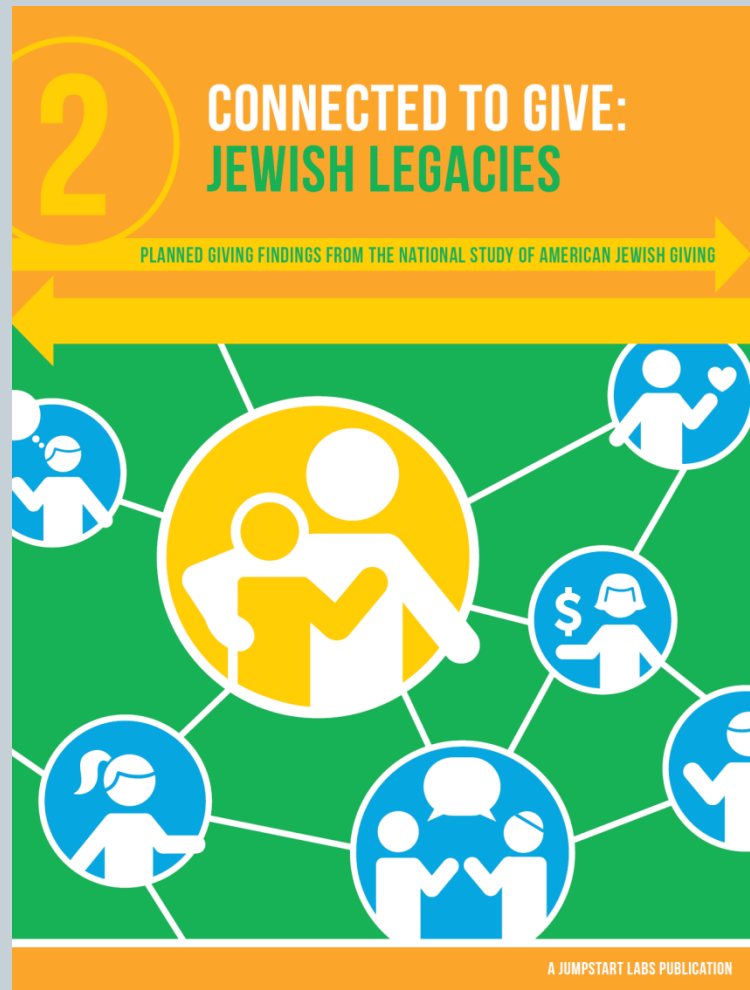
\$12.075 million

in expected future endowment gifts

- *Connected to Give: Jewish Legacies* findings
- Your Successes, Challenges and Unexpected Observations
- The Legacy Conversation
- The Integrated Ask
- Market Effectively
- Steward Effectively
- Legacy Gift Tracking
- Develop a “Culture of Philanthropy”
- Next Steps



Connected to Give



Connectedness to Jewish community

100% have moderate to high levels of Jewish social engagement

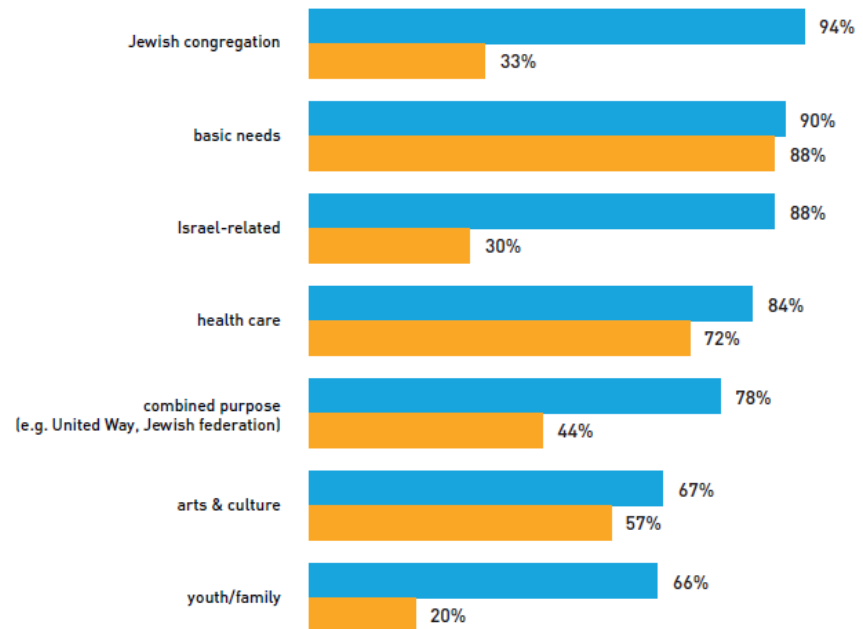


Planned Givers without Jewish bequest give considerably less to Jewish organizations

planned givers with Jewish bequest(s)

planned givers with no Jewish bequest

Current-year giving by Jewish planned givers (to all organizations)





Legacy donors are more generous annual donors



Legacy donors see themselves as **investors and partners and **expect a high level of stewardship****

After legacy gift secured, **continue to engage with donors by **communicating with them often, regularly acknowledging** the gift and keep them connected to give.**



Seek active participants in programs or services

Most loyal supporters regardless of wealth

Attract legacy gifts by sustaining deep, life-long connections





Successes

Challenges

Unexpected Observations

The **right person(s)** asking for
The **right gift** at
The **right time**



The **conversation** must be **donor-centric**

- How can we help you help the Jewish people?
- What do you want to accomplish with your philanthropy?
- How can we help you make your philanthropic dreams come to fruition?

DITCH THE PITCH

A Guide to Successful
FUNDRAISING



by STEVE YASTROW

Here are the six Ditch the Pitch Habits:

1

Think Input Before Output

In a conversation with a donor, let everything you say or do be informed by what you hear and observe.

2

Size Up the Scene

As you listen and observe, take stock of your potential donor's character and situation to understand what this particular donor's reasons for giving may be.

3

Create a Series of "Yeses"

A conversation only moves forward if both parties continually agree to let it move forward. Always find something to say "yes" to as you speak with your donor, avoiding the words "no" and "but."

4

Explore and Heighten

As you engage your potential donor, look for ways to take the conversation to a higher level. Explore to find what your donor really cares about and then heighten by discussing why these things are important.

5

Focus the Conversation on Your Donor

Resist the temptation to talk about your organization. Instead, have a conversation that is mostly about the donor.

6

Don't Rush the Story

Your donor won't be ready to hear your ideas as fast as you come up with them. Let the story emerge through your conversation, at a pace your donor can accept.



An integrated ask (annual, capital, legacy campaigns)

**donor is given the opportunity to invest in
your organization in a variety of ways**

utilizing the time frames, forms and asset structures
that best meets their philanthropic desires

Benefits to your organization



Efficient and saves time

Opportunity to **thank** and
invest in your organization

Changes your conversation from
transactional to donor-centric

Allows you to **build stronger**
relationships with donors

Provides **short-term and long-term**
financial needs of your organization.

Benefit to Donors



Efficient and saves time

Recipient of your gratitude and appreciation

Better understanding of the **role they play** in your organization's success

Opportunity to **envision the larger philanthropic impact** they can have,

Share their personal interests and philanthropic dreams

Sample appointment language

Arlene, I ‘m calling you because you have been such a critical part of our work. You’ve been a donor for more than 10 years (you’ve served on our board etc.). You understand our value to the community and the critical impact we have on (your focus – Jewish life, Jewish identity, serving the needy). May I come talk to you and get your input? We are working on increasing our annual support and planning for our future. I’d love to have you partner with us to make this happen.”

– 1) knows why you are calling; 2) is reminded of her long-term engagement with your organization and; 3) will understand why you’d like her input and participation.



Two Ways of Handling an Integrated Ask

- Ask separately for annual and legacy commitments
- Ask jointly for both types of gifts at the same time

Separate Requests



Ask the donor to consider an Annual, Capital or Endowment Campaign gift with a specific dollar amount or a percentage increase

- “Would you join me in supporting (your organization) by making a gift of \$X?”
- “Would you join me in supporting (your organization) by increasing last year’s commitment by (\$ amount or percentage?)”



**If they
respond
Yes to
Annual,
Capital or
Endowment
Campaign**

- Ask them to partner with you by considering making a legacy commitment now in addition to their generous annual/capital /endowment/campaign support.
- “Thank you so much for your current operating support(or capital/endowment campaign support) Have you heard about our Legacy program?”
- Briefly review how the program works and share the letter of intent. Make sure to advise them of the incentive grant.

The Conversation



**If they
respond
No to
Annual,
Capital or
Endowment
Campaign**

- “Thank you for your consideration. You have been a committed donor over the last several (or many) years and we appreciate your support. I understand you are not prepared to commit to an annual gift now.”
- “Perhaps you would consider leaving a legacy since you can do so without having to make a payment now or in the near term.”
- Enter into a “legacy conversation” with them. Review the program with them, make sure to include information about the incentive grant to motivate them to make their commitment now rather than later and share the letter of intent form.



Ask Questions
Share your case statement
Tell your story
Invite them to partner with you





Be prepared to respond no matter what the outcome

- **YES** – Great! Thank you so much and review the Letter of Intent with them.
- **MAYBE** – ask if there is any additional information you can provide them that would help them with the decision.
- **NEED MORE TIME** - set up another time to meet with them, or for a follow-up phone conversation.
- **NO** – ask them why and depending on the reason, ask if it would be ok to follow up with them in 6 months or next year.

Thank them for their time and considering your request (or saying yes!)





Immediately after the meeting:

- **Send thank you note**
- **If follow-up, remind them**
- **Jot down notes from the meeting**



Role Playing





LEGACY MARKETING CHECKLIST

- _____ Create a Legacy Society – print names, post names, recognize at events
- _____ Print on Envelopes and Stationery: “Remember the Temple XYZ in your will or estate plan”
- _____ Use Tag Line when appropriate: “Made possible through a bequest” or “Temple XYZ thanks (name) (of blessed memory) for remembering the synagogue in his will.”
- _____ Add a special notation on nametags
- _____ Run Display Ads – use HGF templates, or design your own
- _____ Write Articles for Publication – educational, short, varied, and readable
- _____ Send a Newsletter – articles, testimonials, display ads, contact info, website, reply card
- _____ Put Information re: Legacy Society on your Website
- _____ Publish Testimonials – range of donors, use photos; print or video
- _____ Distribute an Informational Brochure
- _____ Send Occasional E-mail Messages – short, exciting, concise, easy, 4-6 times per year
- _____ Use Social Media as appropriate
- _____ Use Direct Mail – readable font, warm inviting tone, call to action, handwritten address
- _____ Plan a Legacy Event – tag on to existing event, or event specifically to honor Legacy donors
- _____ Connect with Professional Advisers – educate them, enable them to assist clients

Additional Tips:

- Make it clear amount doesn't matter
- Once donor submits Declaration of Commitment – don't continue to send requests - steward instead
- Make sure contact information is clearly identified on all marketing pieces

Michael Kesner
Jeffrey and Beth Kopin
Jeffrey and Roberta Kwall
Victor and Arielle Levitan
Mildred Lidov
Cara Madansky-Stiebel
Manny and Kathryn Marczak
Larry Pachter and Sandy Starkman
David Rosen and Amy Zisook
Jeffrey and Lisa Rosenkranz
Alan and Mally Rutkoff
Richard and Pamela Schlosberg
Skip and Lynn Schrayner
Phyllis K. Shalowitz
Leonard Sherman
Yadelle Sklare
Mark and Mae Spitz
Morton and Miriam Steinberg
Mayer Stiebel
Benton and Sandra Strauss
Howard Turner
Richard and Roberta Wexler
Jeffrey Wohlstaeder
Frances Lee Zand and Pendra Shalem

Utilize Nametags or Pin

Your logo
here

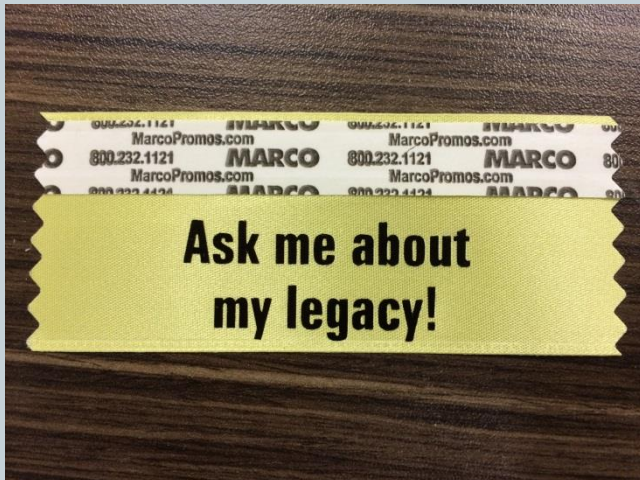
Leo Schwartz

Ask me about my legacy

Your logo
here

Jeff Siegel

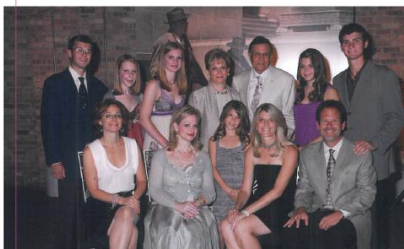
Legacy Society Member



YOUR LEGACY MATTERS

Help North Suburban Synagogue Beth El thrive for years to come

North Suburban
Synagogue
Beth El
בית מוסד בית אל



Remember us in your will or estate plan

To learn how to Create Your Jewish Legacy contact:



Nancy Kelst
847-432-8900
nkelst@nssbethel.org



THE FRIENDLY FOLKS PICTURED HERE HAVE SOMETHING WONDERFUL IN COMMON.

All serve on the Create a Jewish Legacy team of an organization they love –
and every one of them has signed a Letter of Intent to leave an after-lifetime gift.

A huge "Thank You" to all who serve on Create a Jewish Legacy teams throughout Western Massachusetts:

Galina Abashina, Kenneth Abrahams,
Dr. Stuart Anfang, Elaine Baskin, Mollie Blatt,
Nancy & David Carmen, Michael Chernoff,
Sharon Cohen, Richard Cohen, Joel Creeger,
Lou Davis, Rabbi Max Davis, Sue Donnelly,
Joe Dorison, Meredith Dragon, Adina Elfant,
Carol Engelson, Dr. Paul Farkas, Marlene Fine,
Susan Weiss Firestone, Bette Gerstein,
Dick Gerstein, Dr. Norbert Goldfield,
Susan Goldman, Jonathan Goldsmith,

Ed Greenbaum, Howard Greene, Haim Gunner,
Judy Ingis, Susan Kimball Halpern,
Carol Kaminsky, Rabbi Amy Walk Katz,
Dara Kaufman, Rabbi Chaim Kosofsky,
Rabbi Noach Kosofsky, Deb Krivoy, Eli Kwartler,
Jodi Page-Lacoff, Amy Lindner-Lesser,
Joan Kagan Levine, Dr. Stephen Levine,
Iris Linson, Jeff Mandell, Pearl-Anne Margalit,
Robert Marmor, Linda Minoff, Amy Nee,
Ronda Parish, Michael Paysnick, Rhoda Peskin,

Sue Polansky, Courtney Pupkin,
Dr. William Robbins, Burton Resnic,
Marjorie Resnic, Joan Rosner, Michael Rosner,
Debbie Rubenstein, Joanne Saltman,
Lynne Satlof-Karas, Deborah Bromberg Seltzer,
Cantor Emeritus Morton Shames, Gary Shaw,
Rabbi Mark Shapiro, David Sharken, Fay Smith,
Steve Sussman, Rachel Vigdeman,
Phil Wellerstein, Rabbi Benjamin Weiner,
Gwen Weisberg

What will YOUR legacy be?

For more information, contact Linda Minoff at the Jewish Endowment Foundation today:

lminoff@jewishwesternmass.org • 413-732-9994



CREATE A JEWISH
LEGACY



www.jewishlegacywesternmass.org

Utilize Your Website



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LEGACY SOCIETY

For Living Judaism

"Just as they planted trees for me, I am planting trees for my children and grandchildren so they will be able to eat the fruit of these trees"
-Honi, the circle maker

Jewish camping is the strongest stimulus to building Jewish identity in youth. Camp's mission is to increase the self-esteem of our campers, strengthen their Jewish identity, and create a stronger Jewish community.

The Legacy Society for Living Judaism was formed to secure the future of Camp Newman. Through the inclusion of camp in the estate planning of its members, the long-term success of camp's mission will be achieved for generations to come.

To make Camp Newman part of your estate plan, and ensure the long-term success of the camp, let us know by completing a Letter of Intent. We recommend speaking with your financial advisor to discuss what is optimal to meet your needs.

To discuss your planned gift to camp, contact Tracy Klapow, Development Operations Director, at tklapow@urj.org

Rabbi Jason Gwasdoff



We have a challenge – to find what will help our people to continue on...camp will inspire children to **want** to be Jewish, to dig deeper into their Jewish identity"

For information,
contact:

[Tracey Klapow](#)
Development Operations
Director
(415) 392-7080 x13


Important Documents

 [Why Legacy? \(PDF 479.62 KB\)](#)

Here is our Statement about why Legacy is critical to the future of Camp.

 [Legacy Society Members \(PDF 226.33 KB\)](#)

Here is a list of our members

 [Letter of Intent \(PDF 292.09 KB\)](#)

Signing a Letter of Intent expresses your promise to include Camp in your estate plan.



John Delesio Blumenreich: Why I Created a Jewish Legacy

My husband, Adam, and I joined Temple Emanu-El after moving to Westfield. Neither of us belonged to a religious institution in our adult lifetime prior to moving to Westfield. Our observance of Judaism was limited to High Holiday services at the Javits Center and Passover Seder with Adam's family. It came as a surprise to some of our friends and family when we became members of a Temple.



Our reason to become members of TEE was simple. We were looking for community. We wanted to belong to an organization whose mission aligned to our own principles and practices of social justice and religious observance. We wanted to be part of a community which was committed to social justice and would encourage both of us to explore and express our own religious fulfillments.

"Temple Emanu-El has provided a boundless sense of community... and I believe it is our obligation to give back to this institution."

I have chosen to become a Legacy donor because I want to make certain that this community is sustained for all those individuals and families who are searching for this same sense of community. Temple Emanu-El has provided a boundless sense of community for Adam and me for these past five years and I believe it is our obligation to give back to this institution.

What will your legacy be?

Remember Temple Emanu-El in your will or estate plan. For more information, contact Carolyn Shane, Executive Director, at 908-232-6770, ext. 114 or cshane@tewnj.org, or Gail Friedman, Committee Chair, at 908-232-2859 or gailfriedman@comcast.net.



"I did not find the world desolate when I entered it. And as my parents planted for me before I was born, so do I plant for those who will come after me."
-Talmud

SAVE THE DATE

Friday, May 15, 2015

We will recognize the Charter Members of our Temple Emanu-El Legacy Society and celebrate the first year of our Create a Jewish Legacy program.

Remembering Temple Emanu-El in your will or estate plan ensures that your work and your values will continue when you are no longer here. It also serves as an example of ongoing kindness to your loved ones. It teaches them the value you've placed on supporting Temple Emanu-El and the Jewish community.



**Why I have chosen to
become part of the
MJCBY Legacy Program:**



Neil Frigand:

My Legacy bequest to the Morristown Jewish Center is based on the respect and love of my beloved father, Herman J. Frigand, had for its staff, membership and Minyonaires. May his years of leadership of the annual Kol Nidre appeal and its affect in support of our synagogue continue through my bequest as well as the Legacy of other members.

This is an outstanding institution of learning, prayer and faith. Join me in ensuring its continuity for many years to come.

**Why we have chosen to
become part of the
MJCBY Legacy Program**



Irv and Dorothy Cohen

Our family has celebrated many simchas at MJCBY: the Bat and Bar Mitzvahs of our four children, Ufrufs, Namings of our grandchildren, award ceremonies, weddings and celebrations with friends and fellow members. What better way to ensure the viability of our synagogue then to leave a legacy gift. Even in our absence, we will continue to share our love of Judaism, our belief in the Conservative movement, and support of MJCBY. Am Yisrael Chai!



JSDD Legacy Society: Ensuring the Future of Vital Services

JSDD Legacy Society is a group of individuals who are committed to ensuring that people with developmental disabilities continue to be supported in a dignified and inclusive way.

We are family. JSDD is the answer to the question, "How will adults with a disability develop their own identity and live independently?" We established the first kosher, community-based residential setting for men and women with developmental disabilities. Today, we have 11 supported-living homes with 40 residents whose families want them to achieve the greatest level of independence possible within the community.



Residents share a laugh in their cozy Maplewood home.

Since our first home opened in 1989, JSDD is the extension of family life for the people we support. We embrace the expectation that men and women, whether or not they require assistance, will move out of the home in which they grew up and make their own lives in the world. The environment provided by JSDD encourages family involvement while encouraging the evolution of independent interests and life choices.

We provide opportunities for inclusion. Our Wae (Wellness, Arts & Enrichment) Center, which serves about 150 people a year, was founded on the belief and knowledge that each individual possesses the potential for creating a meaningful life, a process we call "Finding the Spark Within." The Center offers individuals opportunities to develop skills and cultivate self-esteem while participating in artistic, wellness and enrichment activities.

The Center's Chairs of Inclusion project demonstrates our belief that every person is entitled to a seat at the table, both in family life and in the wider community. To create the project's life-sized chairs, professional artists brought their concepts and materials and collaborated with Wae Center artists.

We need your help. When you participate in Legacy, you are ensuring JSDD can continue helping individuals with developmental disabilities and advocating for their integration into Jewish and secular communities.

Congregation Beth Israel Legacy Circle

A Lasting Jewish Impact is
Well Within Your Reach



This is a call for you to join our CBI Legacy Circle. The CBI Legacy Circle is comprised of people like you, people who believe in our future. This moment in time calls upon us to preserve and strengthen what past generations have built here at CBI. Together we can ensure a strong CBI future.

All of us, regardless of age, wealth or affiliation, have the ability to leave a meaningful Jewish legacy. Your legacy gift of any size can be customized fit your dreams, lifestyle, family and financial needs. **Let us celebrate you today as you plan for a Jewish tomorrow.**

**Temple Beth Ahm Yisrael
Legacy Society**

CREATE
YOUR
JEWISH
LEGACY

October 2014

www.jsddmetrowest.org

973 272-7148

270 Pleasant Valley Way
West Orange, NJ 07052

Email and Social Media Posts



Dear (Insert First Name),

Six years ago, Dede and I attended the groundbreaking ceremony that would forever change our lives. Our dream of building a first-class Holocaust Museum in the Midwest came true. Each year, the Illinois Holocaust Museum & Education Center welcomes visitors from across the country including 50,000 students and educators from more than 500 schools on field trips. It is truly an inspiring sight to see yellow school buses line up each day during the school year as over 600 students tour the Museum and have the rare opportunity to hear first-hand testimonies from Holocaust survivors and genocide eyewitnesses.

Building the Museum was the vision and hope of survivors and a community who rallied around the promise to "Never Forget." While significant fundraising contributed to the construction of the Museum, **It is now time to secure the Museum's future.** Dede and I have joined the newly created *Legacy Society* at the Museum. This new group will help provide the funding which will safeguard our precious artifacts and guarantee the continuation of our educational programs designed to combat rising prejudice, hate and indifference that fuel antisemitism and other violence being experienced around the world today.

We each plan our future in different ways. Some people make an outright gift; others must plan for later years. Whether you are creating a will for the first time or revisiting your estate provisions, we hope you will join us in the *Legacy Society* and include the Illinois Holocaust Museum and Education Center in your philanthropic plans.

Legacy Society members will be listed in a prominent place in the Museum's lobby, acknowledged in the Museum's annual report and receive invitations to special events. We invite you to join this special group whose impact will be felt generations into the future.

There is no minimum to join. All gifts to the *Legacy Society* are appreciated.

[CLICK HERE FOR MORE INFORMATION](#)

Please call 847-967-4502 if you have any questions on how you can help guarantee the future of the Museum!

Sincerely,

Sam Harris
Survivor
President Emeritus

Use Direct Mail

Elul 5775

Name
Address
City, State Zip

Dear Informal Salutation,

The High Holiday season is a time for reflection and introspection. It is a time to consider the things that you treasure, such as family, the Jewish community, meaningful Jewish organizations and making a difference in the world.

As a member of Congregation Agudath Israel, you support our shul in a variety of ways, but have you thought to include us in your will or estate plan? By leaving a legacy, you can assure that the connection, which you feel for the Jewish community and our congregation, will exist for future generations.

Your participation in the community-wide *Create a Jewish Legacy* program does not require a cash donation today. It is simply a promise for the future. A legacy commitment will enable you to:

- Convey your commitment to being Jewish and the role CAI plays in your life
- Set an example for your family and community
- Impact CAI in the future in a way you may not be able to do today
- Preserve the special qualities of the CAI community
- Perpetuate the Jewish traditions you cherish
- Express beliefs instilled in you by your parents and grandparents

All of us, regardless of age or wealth, have the ability to leave a legacy. Your legacy gift of any size can be customized and structured to fit your family's needs, your financial situation, your dreams and your lifestyle. You can choose to provide general support for the shul or to designate your legacy for a particular area of interest.

The simplest methods of leaving a legacy are through a will or estate plan or by adding or changing a beneficiary designation on a retirement fund or life insurance policy. Your legacy commitment can be a percentage or a specific dollar amount.

We invite you to join the CAI Legacy Circle. If you have already included a legacy gift to CAI in your will or estate plans or if you are just thinking about including CAI in your legacy plans and would like to learn more, please tear off and complete the form below and return it to Pamela's attention in the synagogue office at 20 Academy Road, Caldwell, New Jersey 07006. If you prefer, you may contact Pamela directly at 973-226-3600, ext. 113 or pgoldstein@agudath.org.

Wishing you and yours a happy, healthy, peaceful and sweet New Year,

Esther Kartus

Esther Kartus
CAI Legacy Team Chair



Pamela Goldstein

Pamela Goldstein
CAI Director of Development

☐ I have already included CAI in my estate plans. Please contact me so I can confirm my commitment.

☐ I am interested in learning more about the CAI Legacy Circle. Please contact me to tell me more.

Name _____ Best Contact Number (____) _____



Thank You Legacy Donors

The following individuals/families are in the Book of Life Society and have granted us permission to share with you that the Hebrew Cemetery Association has been included as a beneficiary of their legacy gift.



Anonymous*	Aileen and David Epstein	Harry Lerner	Peggy McManus	Amy and Mark Vithner
Lisa and Barry Blau	Sandra Goldman	Jerry and Barbara Levin	Paula Sigal Musler	Martha and Brian
Jill Blumenthal	Bill and Patty Goretlick	The Leon Levine Foundation	Marc and Mattie	Yesowitch
Herman (OBM) and Anita (OBM)	Barry and Lorie Klemens	Julie Lerner Levine	Silverman	*Donors who wish to remain
Blumenthal	Elise and Jaime Kosovsky	Rose and Abe Lusk	Marda and Paul Simon	anonymous
Barry Bobrow and Karen Knobbe	Eric Lerner	Kevin Levine and Louis Strick	Lori Levine and Eric Sidut	OBM - Obituary Ministry



704.973.4544 • charlottejewishfoundation.org
A supporting organization of Foundation for The Carolinas



The Hebrew Cemetery has a wonderful opportunity AND we need your help!!

We invite you to join our HCA legacy society. If you do so by February 15, 2015, you will help the cemetery secure a greatly needed incentive grant from the Harold Grinspoon Foundation.



Please contact Sandra Goldman, Hebrew Cemetery Director at 704-576-1859 or director@hebrewcemetery.org or go to charlottejewishlegacy.org for more information about creating your Jewish legacy.

Targeted Direct Mail



Dear Dena and Randy,

Your family is a cherished member of the Camp Newman family and we hope you carry camp in your heart. For three generations, you have shared a love for camp.

Do you remember the first special moment you had at camp? Was it dressing in white for Shabbat and singing and dancing like crazy? Perhaps it was each time you made a new friend? Generation to generation camp is a powerful experience.

We invite you to join us in our Legacy Society for Living Judaism.

By naming Camp Newman in your will or estate plan, you will join others, like you, who believe that camp is:

- A loving and wonderful way for children to enhance their Jewish identity and love for Judaism.
- Where children learn to better themselves and the world by living and internalizing Jewish values.
- An amazing place to inspire future Jewish leaders.

Your gift will ensure that camp thrives for future generations so more children can feel as 14 year old camper Rachel does, "I knew that I had found a piece of my Jewish heart. Thank you for giving me a place to call home."

We look forward to seeing you at camp this summer for a visit!

Ruben Arquilevich,
Executive Director

Gale Swartz
Legacy Society Chair

P.S. You will help camp in a significant way without any cost to you.

It's Easy !!

Legacy Society for Living Judaism

Step 1: Learn More

Phone: 415-392-7080 Dena Kaufman
Email: dkaufman@urj.org
Web: www.CampNewman/give/Legacy

Step 2: Join Us

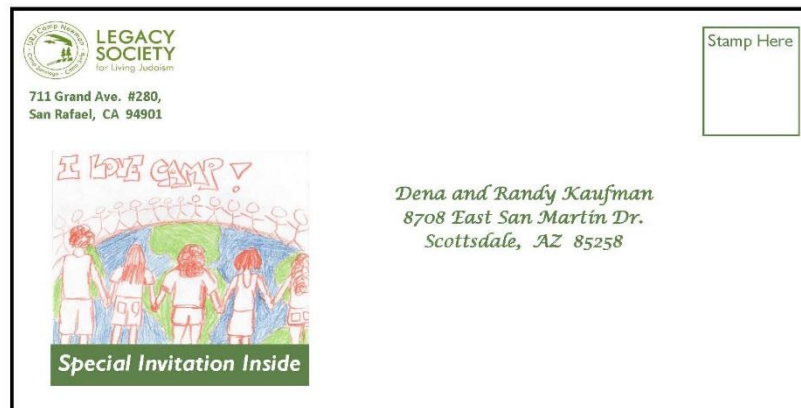
Mail or email: Reverse side Letter of Intent

Step 3: Formalize your gift by naming Camp Newman as a:

- * Beneficiary of Life Insurance
- * Beneficiary of Retirement Account
- * Bequest in your Will or Trust
- * Recipient of Real Estate or Securities
- * Recipient of an Endowment Gift

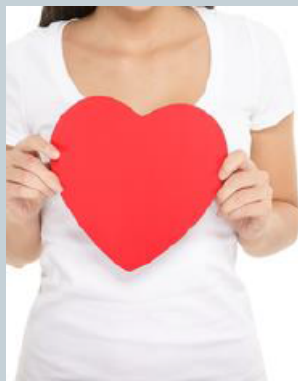
Please update our records if needed:

Name: _____
E-mail: _____
Address: _____
Best Phone: _____
____ Cell ____ Home ____ Work



Words that Work

Dr. Russell James



**Social
Realm
(identity)**

I help people
because of who
I am

**Use
family
language**

Stories
and
simple
words

**Avoid
market
language**

Formal,
legal, or
contract
terms



**Market
Realm
(exchange)**

I engage in
transactions by
formal contract

**Would you say it in a
normal conversation
with your grandmother?**

**Philanthropy is a SOCIAL act using the
mechanisms of FAMILY bonding**

References to “important in your life” increase interest

2014 & 2015 Surveys, 1,822 Respondents

**Interested
Now**

40%

Make a gift to charity in your will to support causes that have been important in your life

30%

Make a gift to charity in your will

12%

Make a bequest gift to charity

**Will Never
Be
Interested**

6%

7%

14%

Simple language and starting with honor

2014 Survey, 1,961 Respondents, Groups Y/B/H

**Interested
Now**

**Will Never
Be
Interested**

32%

Honor a **family member** by making a **tribute** gift to charity in my will

11%

23%

Honor a **friend or family member** by making a **memorial** gift to charity in my last will & testament

17%

13%

Make a **bequest** gift to charity in my last will & testament **in honor of a friend or family member who was passionate about** the charity's work

21%

Stewardship

- Thank you note
- Phone call
- Cards – Birthday, Holiday, Anniversary of Legacy Commitment
- Personalized letter specifically for legacy donors
- Gifts

Personal Touch

- Newsletters or newspaper
- Website
- Poster, digital display or donor wall
- Annual report or programs
- Annual meeting or other gatherings

Donor Listings/ Testimonials

- Legacy Shabbats
- Annual meetings – light candles
- Galas or other special events

Recognition at “community” gatherings

Special gathering for Legacy donors

- Reception before “community” gathering
- Shabbat Dinner
- Invitation to event not open to general community



LEGACY STEWARDSHIP CHECKLIST

Send a personalized handwritten thank you note

Within 48 hours of receiving Declaration of Intent

Within 48 hours of receiving confirmation of formalized gift

Periodically to show appreciation for their commitment

Personal phone call

A week after receiving Declaration of Intent

A week after receiving confirmation of formalized gift

Periodically to stay in touch and keep informed/engaged

Personal meetings

To discuss formalization of commitment

Periodically to stay in touch and keep informed/engaged

Keep accurate records of all interactions with donor – separate file for each

Donor Recognition

Public listings – website, newsletters, annual report, in lobby, in event materials

Personal notes/cards – birthdays, holidays, with articles of interest, with invitation to organizational event

Special legacy donor events – to honor their commitment to your organization

Small gifts – if fits with your organization's culture

At organizational events – annual meeting, gala, major donor's event

Ongoing Communication – Letters/Newsletters – minimum of 4 times a year

Engagement

Ask to speak at or host a legacy event

Invite to join a committee

Invite to attend a non-legacy special event

Honor at a Legacy Shabbat or other organizational event

Share their story – Printed or video testimonial

Use Funds Wisely

Invest endowment funds with trusted partner

Maintain a state of financial well-being

Use donor's funds as they intended

Report Your Impact

In newsletters and letters

In annual reports and at annual meetings

On website

Organize and manage stewardship in conformity with the Donor Bill of Rights

Other Stewardship Activities

Public Recognition



Temple Beth-El Mekor Chayim Create a Jewish Legacy Donor Shabbat

As the first donors to make a commitment to Temple Beth El Mekor Chayim's future through the Create A Jewish Legacy program, we are delighted to introduce you as leaders of our community and founding members of TBEMC's Legacy Circle.

We wish to recognize you and thank you for setting an example that we hope will inspire others. Yasher Koach and Todah Rabah to each of you for giving a part of yourselves to TBEMC.

All are invited to enjoy Shabbat Kiddush Luncheon

*"As my parents planted for me before
I was born, so do I plant for those who
will come after me." —TALMUD*



Founding Members of the TBEMC Legacy Circle

Laura and Aaron Cohen

Charles Colodner

Judith and Gary Daniel

Bertram Fine

Alice Gerson Goldfarb

Marvin Greenberg

Debbie and Dr. Mark Kaplan

Roberta and Judge Frederic Kessler

Sam Kimmelman

Linda Ershow Levenberg and David Levenberg

Dr. Nancy Lubarsky and Donald Shapiro

Dr. Robert Meth

Stephanie and Jaron Rubenstein

Laura Rubin

Sandy and David Springer

Myra and Phil Stein

Patricia and Dr. Arthur Werschulz

Public Recognition

May 15,
2015

Create a
Jewish Legacy

26 Iyar
5775

TEMPLE EMANU-EL LEGACY CIRCLE

Toby Goldberger	Dr. Dorothy & Gerry Cantor	Linda & Jay Kaplan	Eric & Gail Friedman	Eugene & Carol Rosner
Isabel Berg	Steven H. Berg	Carol Indursky Cohen	Cantor Martha Novick	
Marc & Roni Epstein	Jordan & Renee Kuperschmid	Michael & Marci Schoenbach	Phyllis N. Buchsbaum	Marlene & Bill Maderer
Rabbi Charles A. & Dr. Terry Kroloff	Mrs. Susan A. Klein	Nancy & David Bregman	Bettye & Steve Barcan	
Elaine Weill	John Delesio Blumenreich	Renee B. Goldberg	The Morgenthal Family	Mr. Sidney Lleppe
Susan & Dennis Dickstein	Renee & David Golush	Susan & Lowell Yemin	Marjorie & Chester Fienberg	
Jane & Peter Berlant	Douglas Sagal & Lauren Sagal	Dr. & Mrs. Norman Lavy	Anonymous	Bob & Susan Fuhrman

Beth Sholom Synagogue would like to recognize and thank the following individuals and families who have invested in our congregation's future by becoming legacy donors:

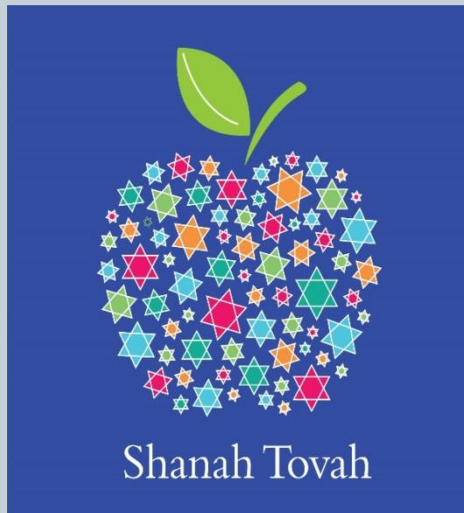
Anonymous (5)
Judith Bookman
Goldie K. Burson
Hallie and Jay Cohen
Sheila and Robert Cohen
Vera and Jess Feldman
Katherine Fox
Alvin Franklin
Sandy Friedman
Suzanne Friedman
Marlene and Herbert Gerson
Rose and Wesley Goldfarb*
Mimi and Ronald* Grossman
Shirley and Gordon Gruen
Seymour Hellman*
Hillary Hodus
Mitchell Hodus
Judith and Doron Holzer
Minette Kochman
Mildred Krasner*
Elaine and David Krueger
Diane and Steve Leib
Betsy and Steve Libby
Sandy and Clifton Lipman
Sheri Lipman
Deanna McAlexander
Barbara and Earl Magdovitz
Susan and David M. Moinester
Rachel and Anthony A. Morrison
Rose Morrison
Jan F. Murray
Barbara and Bruce Newman
Marcia and Alvin Notowich
Lyda Parker
Rose and David Ross
Susan and Richard Rossen
Joanne Levine and Noah Sabin
Andrea and Craig Sander
Kay Usdan and Sheldon Saslawsky
Kate and Danny Schaffrin
Rachel and Stephen Shankman
Alayne Shoenfeld
Adele and Saul* Sorg
Daniel Spector
Mariette and Joel Turetsky
Andie and Michael Uiberall
Bert and Arthur J. Wolff
Ellen Ziskind

**of blessed memory*



Beth Sholom Synagogue

Personal Recognition



Legacy Gift Tracking



- **Create a file** for each person/couple who have made a legacy commitment
- In the file place
 - The **Declaration of Intent**
 - Copies of **correspondence** with the donor
 - A copy of the **Stewardship Checklist** so you can keep track of your contacts with the donor
 - A copy of the **Legacy Commitment Form** or other documentation that the gift has been formalized
- Create an **electronic tracking system**...either using your donor database management system if you have one or an excel spreadsheet to track the donor, when the commitment was made, when you last spoke with them, when the gift was formalized and when the gift is realized.
- If you have the ability to set up a **reminder system**, its great to be able to send the donor a card or call them to thank them for their commitment on the anniversary of receiving their Letter of Intent.

Culture of Philanthropy



- Legacy giving must **be a priority and shared responsibility of the board and staff**
- Legacy program makes **philanthropy** possible by **bringing together** a particular **cause and donors** who are willing to invest in it
- **Everyone accepts and celebrates your donors and their commitment** no matter the type or size of the gift
- **All staff and board must be an ambassador for the organization**

- Simone P. Joyaux

Next Steps



- **Year 2 ends March 31, 2016**
- **Review your prospect list**
- **Assign prospects to each member**
- **Each team member have a minimum of one conversation a month in order to reach goal**
- **Make appointments**
- **Schedule regular team meetings**
- **Continue to fill out your quarterly reporting**
- **Continue your marketing**
- **Stewardship, Stewardship, Stewardship**
- **Next Training – “Being Donor-Centric” – Tuesday, February 9, 2016**



As my fathers
planted for me,
so do I plant for
my children

- Taanit 23a

Legacy Best Practices

Arlene D. Schiff – November 2015
Harold Grinspoon Foundation