

# LIFE & LEGACY™

## MARKETING YOUR LEGACY PROGRAM



LEHIGH VALLEY  
JEWISH FOUNDATION

THE JEWISH COMMUNITY'S ENDOWMENT FUND  
*Jewish Federation of the Lehigh Valley*



LIFE &  
LEGACY™

Assuring JEWISH TOMORROWS

A program of the HAROLD GRINSPOON FOUNDATION



# SET THE PLAYING FIELD

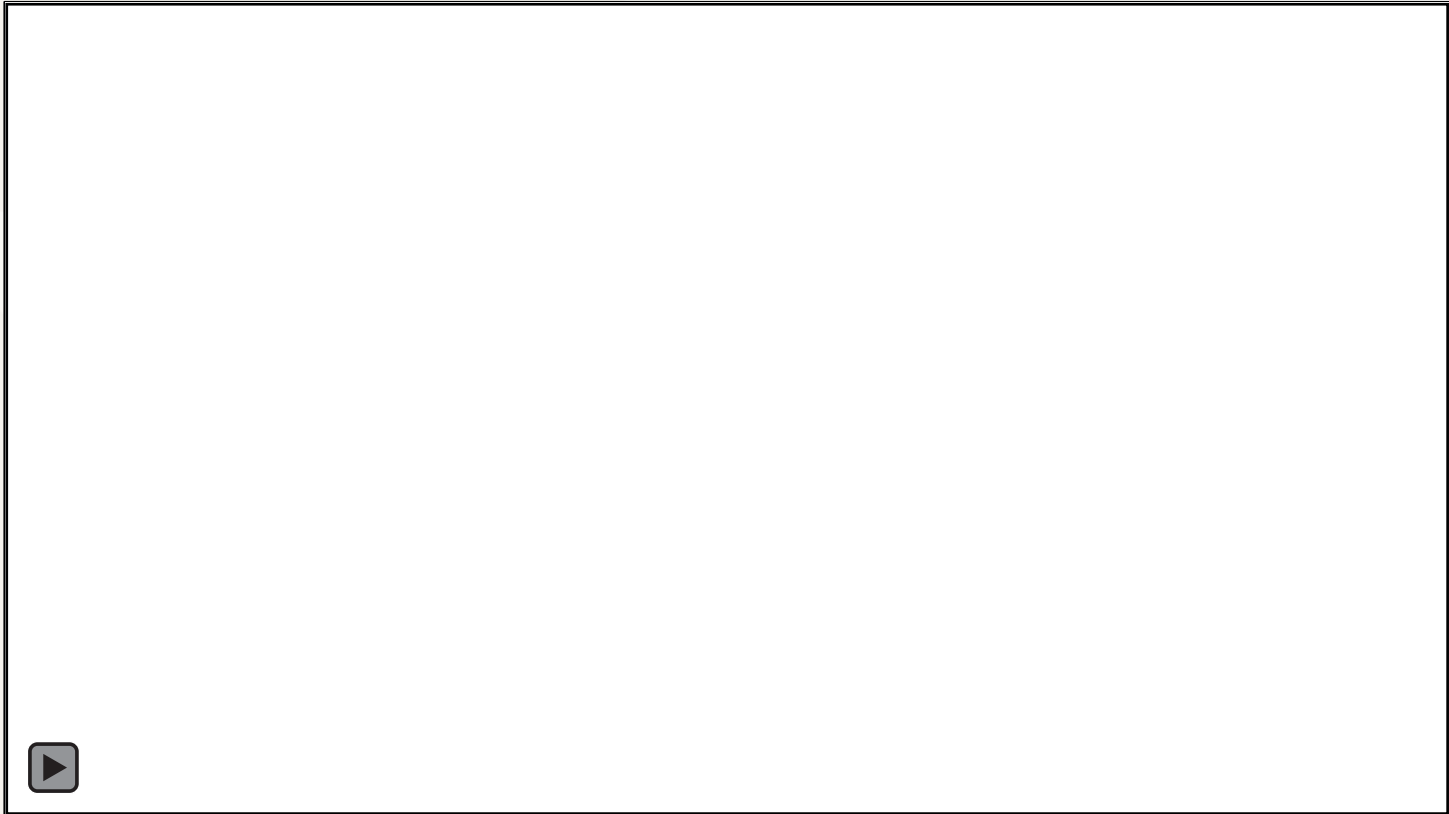
- Create a marketing plan
- Institute branding guidelines
- Decide which resources you will provide and which you will not
- Communicate regularly with your participating organizations

# IT'S A MARATHON, NOT A SPRINT

- Marketing needs will continue long after your four years with Grinspoon
- Gaps in your marketing will have long-lasting effects
- You don't need to be fancy
- Keep sending out your message
- It may take time for the message to stick, but don't give up hope



# ONE RESOURCE: WHAT IS LIFE & LEGACY VIDEO



# WHAT WE PROVIDE TO OUR PARTNERS

- Design services
- Community newspaper coverage
- One banner or poster marketing the program
- Web and social media content
- Donor recognition materials



# WHAT WE EXPECT OF OUR PARTNERS

- Follow Grinspoon Foundation branding guidelines
- Must display LIFE & LEGACY and Lehigh Valley Jewish Foundation logos on all pieces
- Provide donor stories to Federation
- Promote LIFE & LEGACY in bulletins and newsletters and on websites
- Responsible for their own printing
- Share best practices

# MARKETING SAMPLES

Banner



**CONGREGATION KENESETH ISRAEL**  
**PROUD LIFE & LEGACY**  
*partner*

A community-wide effort to secure our Jewish future  
 TALK TO US TO LEARN MORE ABOUT CREATING YOUR LEGACY

**LEHIGH VALLEY JEWISH FOUNDATION**  
THE JEWISH COMMUNITY'S ENDOWMENT FUND  
 Jewish Federation of the Lehigh Valley

**LIFE & LEGACY**  
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**CONGREGATION KENESETH ISRAEL**  
*A Caring Community*

Brochure



*your legacy at*  
**CONGREGATION KENESETH ISRAEL**

In 1904, a group of Jewish merchants shared a vision – to create something unique to Allentown, a Reform Jewish home. They created a sanctuary that would provide an environment for Jews to commune and worship on Shabbat, celebrate lifecycle events, provide a Jewish education for their children, and provide solace and comfort for the bereaved and those seeking connection with their Jewish heritage. This group eventually became Congregation Keneseth Israel.

KI is the Jewish home for many who want to experience the wonder of Reform Judaism, listen to the awe-inspiring sound of the shofar on Rosh Hashanah and Yom Kippur and welcome Shabbat each Friday night to the deeply felt and marvelous vocals of our choir.

Growing up and raising children in an assimilated world is challenging. KI is a place where our children and parents meet and establish Jewish bonds. As Jews, we learn, share, exchange, practice tikkun olam, celebrate and grieve in a safe and loving environment.

KI is an integral component in the wider tapestry of both the Jewish and non-Jewish communities of the Lehigh Valley. Community collaboration has reached new levels. Many KI members are adding more meaning and purpose to their lives by broadening their volunteerism, serving others and participating in various community activities. At KI, people make the difference.

The future is today. Our KI L'Dor Va'Dor Legacy Society members are people like you who, with God's hand and a wonderful soul and spirit, want to ensure that Reform Jews have a place to learn, pray and grow together. Join hands with many KI legacy donors and create an eternal "mitzvah." May God bless you and keep you. Our future starts today!

*What are some easy ways that I can leave my legacy?*

- 1. REQUEST IN A WILL.** You name your preferred Jewish organizations as beneficiaries in your will, and after your death, the organizations receive money or property from your estate. You can leave a percentage of your estate, the remainder of your estate or a specific property or dollar amount.
- 2. TRUST BENEFICIARY.** If you have set up a trust, name your preferred Jewish organizations as beneficiaries of your trust. After a triggering event, your money or other assets will go from the trust to the organizations you have selected.
- 3. LIFE INSURANCE.** Name preferred Jewish organizations as an after-life-time beneficiary of your life insurance policy. You can leave a percentage of the policy to the organizations while leaving the majority to family to take care of their needs.
- 4. RETIREMENT PLAN BENEFICIARY.** Name preferred Jewish organizations as an after-life-time beneficiary of your IRA, 401K, 403B or other retirement plan. Organizations can receive a percentage of the account balance or the dollar amount.
- 5. OUTRIGHT GIFT.** You may gift money or other assets now that will provide funding for your preferred Jewish organizations' endowment. The endowment funds will be invested and the income generated each year will support your preferred organizations in perpetuity.

*L'Shana Tova*



**YOU CAN MAKE EVERY YEAR  
 A SWEET YEAR!**

"As a board member, I have seen firsthand the importance a congregation like Am Haskalah has in making Judaism accessible in the Lehigh Valley. Our home welcomes all folks interested in finding their place in the larger Jewish community. This is why I proudly submitted my letter of intent and will include our future in my future plans."  
 - Rachel Zane

**Congregation Am Haskalah**

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**LEHIGH VALLEY JEWISH FOUNDATION**  
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 Jewish Federation of the Lehigh Valley

Bookmark

On **Simchat Torah** ...



Stewardship card

**JDS IS A PROUD  
 LIFE & LEGACY**  
*partner*

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Web button

# MORE MARKETING SAMPLES

**CONGRATULATIONS TO OUR LIFE & LEGACY PARTNERS**

**LIFE & LEGACY** is an innovative partnership to help secure the future of the Lehigh Valley Jewish community.



Learn how you can help light the way for a bright future.  
Contact Jim Mueth at 610-821-5500 or jim@jflv.org.

[lvjfgiving.org](http://lvjfgiving.org)

**TEMPLE COVENANT OF PEACE'S**  
*Chai Society*  
ASSURING JEWISH TOMORROWS IN EASTON

A huge thank you to our Temple members who have chosen to support us in their wills, trusts, retirement accounts or life insurance policies.

JOHN AND INGELISE BROWN HARVEY CARTINE LIZ CARTINE EDWIN DAVIS RABBI MELODY DAVIS BRION AND NANCY EBERT MARK GUTMAN SHELDON HIMBER CHARITY HYDE GLEN JACOBS ALAN KARES	ETHEL KARES (Z'L) SCOTT LEIBER JIM AND SHELAH MUETH JEFF MURDOCH PATI PRICE EILEEN SEGAL JOEL SHNIER RON SUSER STEVE WEINTRAUB KRISTIN ZOHN
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Temple Covenant of Peace's Legacy Team is delighted to answer any questions you may have about this program. Please call our team leader Scott Leiber at (484) 866-0848 for further information.




*Thank you for assuring Jewish tomorrows*

Thank you to those who have chosen to support the Jewish Federation of the Lehigh Valley with gifts in their wills, trusts, retirement accounts or life insurance policies as part of the LIFE & LEGACY program.\*

\*as of February 1, 2019

HOUMAN & LORI AHIDIEH LAUREN BERSON MARC BERSON ROSS BORN WENDY BORN DANIEL & NANCY COHEN EDWIN DAVIS RABBI MELODY DAVIS GLEN & JAN EHRICH IRIS EPSTEIN AMY FELLS ERIC FELLS EILEEN FISCHMANN ROBERTO FISCHMANN	BRIAN & EMILY FORD BARNET & LISA FRAENKEL SANDRA GOLDFARB MARK GOLDSTEIN (Z'L) BEN GROSSMAN BOBBY & BONNIE HAMMILL KATHI KATZMAN SETH KATZMAN LUCY KORSKY FERNE KUSHNER BILL & JANE MARKSON JIM & SHELAH MUETH SANDRA NEWMAN TAFI NEY	ROBERT & LOTA POST CAROL ROBINS BOB ROCKMAKER ALEX & ROBIN ROSENBAUM MARK & DEENA SCOBIONKO LYNNE SHAMPAIN MARK SHAMPAIN JOSEPH J. WEINER ARTHUR & BARBARA WEINRACH JAMES & LINDA WIMMER LARRY ZELSON LAWRENCE & DEBORAH ZOHN
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Donor rec. flyer

Donor rec. poster

**CREATE SOMETHING SPECIAL THIS ROSH HASHANAH - YOUR JEWISH LEGACY.**

**HOW WILL YOU ASSURE JEWISH TOMORROWS?**

Remember Congregation Brith Sholom with a gift in your will, trust, retirement account or life insurance policy. Contact 610.866.8009 or visit [brithsholom.net](http://brithsholom.net) to learn more.



IN PARTNERSHIP WITH




Web banner

# STANDARDIZED HANDOUTS



## LETTER OF INTENT

*Creating a Jewish legacy confirms my/our commitment to support the Jewish organizations that have been important in my/our life and will enable them to endure and thrive for future generations.*

In keeping with Jewish tradition, I/we wish to share my/our blessings with others. Therefore, I/we make this commitment to help provide for the needs of tomorrow.

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Day Phone \_\_\_\_\_ Email Address \_\_\_\_\_

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**The following named organizations are participating in the LIFE & LEGACY program. They have made a commitment to work and learn together for the future of the community. I/we wish to share my/our legacy with the following organizations:**

<input type="checkbox"/> Congregation Am Hashkalah	<input type="checkbox"/> Jewish Community Center of the Lehigh Valley	<input type="checkbox"/> Jewish Federation of the Lehigh Valley
<input type="checkbox"/> Congregation Beth Shalom	<input type="checkbox"/> Jewish Day School of the Lehigh Valley	<input type="checkbox"/> Temple Beth El
<input type="checkbox"/> Congregation Keneseth Israel	<input type="checkbox"/> Jewish Temple of Peace	<input type="checkbox"/> Temple Covenant of Peace
<input type="checkbox"/> Congregation Sons of Israel	<input type="checkbox"/> Jewish Family Service of the Lehigh Valley	<input type="checkbox"/> Other _____

☐ I/we have already made a legacy provision in my/our estate plan.

☐ I/we intend to formalize my/our legacy through my/our estate or a lifetime gift within \_\_\_\_\_ months of signing this declaration.

CONTINUES ON BACK



## LETTER OF INTENT

**Please identify the vehicle(s) through which you have or plan to create your legacy gift (check any that apply):**

<input type="checkbox"/> Bequest	<input type="checkbox"/> Retirement Plan Assets (IRA)	<input type="checkbox"/> To be determined
<input type="checkbox"/> Charitable Gift Annuity	<input type="checkbox"/> Charitable Trust	<input type="checkbox"/> Other (please specify) _____
<input type="checkbox"/> Life Insurance	<input type="checkbox"/> Gift of Real Estate or Tangible Personal Property	

My/our commitment will be approximately \_\_\_\_\_ % of my/our estate, trust, retirement account or life insurance policy. I/we estimate it may have a value of \$ \_\_\_\_\_. I/we understand that this legacy gift will be placed into an endowment fund by the organization(s) selected.

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This Letter of Intent sets an example for members of our Jewish community. Please list my/our name(s) with other signers.

☐ I/we would prefer not to be acknowledged on donor recognition lists.

I/we understand this Letter of Intent is not a legally binding agreement and I/we may amend or modify it at any time.

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

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Support for Lehigh Valley LIFE & LEGACY is provided by the Harold Grinspoon Foundation and the Jewish Federation of the Lehigh Valley





## Legacy Giving Options


### CHOOSE THE GIVING VEHICLE THAT MATCHES YOUR LEGACY GOALS:

<p><b>YOUR WILL</b></p> <ul style="list-style-type: none"> <li>A gift in your will can be a specific dollar amount, a percentage of your estate or an asset such as real estate, securities or other property.</li> <li>Sample language may include: "I give, devise and bequeath \$ _____ or _____ % of my residuary estate to _____ (insert organization name, Federal Tax ID number, city and state).</li> </ul>	<p><b>YOUR RETIREMENT ASSETS</b></p> <ul style="list-style-type: none"> <li>Include one or more charities as after-life beneficiaries with a gift of a percentage of your account.</li> <li>If you have an existing plan, contact your plan administrator and request a Change of Beneficiary form.</li> <li>Retirement assets can be heavily taxed when they pass to your heirs. If you give them to a charity, they pass tax-free.</li> </ul>
<p><b>YOUR LIFE INSURANCE</b></p> <ul style="list-style-type: none"> <li>Donate a new policy or an existing policy that is no longer needed.</li> <li>A new policy where the charity is the owner and beneficiary may provide you current tax advantages.</li> <li>Name one or more charities as after-life beneficiaries.</li> <li>You can donate a percentage of the policy or a specific dollar amount.</li> </ul>	<p><b>YOUR OTHER OPTIONS</b></p> <ul style="list-style-type: none"> <li>Designate the remainder of a Donor Advised Fund or private foundation.</li> <li>Establish a fund at the Lehigh Valley Jewish Foundation to receive your legacy gift that will distribute to organizations of your choice.</li> <li>Create a fund now with appreciated securities, cash or other assets (real estate, mutual funds, royalty interest, etc.).</li> <li>If you are over 70 1/2, you can establish a legacy gift today by using the IRA charitable rollover.</li> </ul>

These descriptions are informational only and do not constitute legal or tax advice. Please consult with a financial or estate planning professional to understand the implications of a gift for your particular goals.



For more information, contact Jim Murth at the Jewish Federation at 610-821-5500 or jmurth@jvf.org



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## Legacy Giving Options

DESIGNATING A NONPROFIT ORGANIZATION as the beneficiary of your estate plan is easy. For your convenience, we have provided a list of the community partner organizations in the LIFE & LEGACY program.


ORGANIZATION LEGAL NAME & ADDRESS	FEDERAL ID #
Congregation Am Hashkalah 1190 W. Macada Road, Bethlehem, PA 18017	23-2075551
Congregation Beth Shalom 1190 W. Macada Road, Bethlehem, PA 18017	24-0795930
Congregation Keneseth Israel 2227 Chew Street, Allentown, PA 18104	23-1489807
Congregation Sons of Israel 2715 Tighman Street, Allentown, PA 18104	23-1671092
Jewish Community Center of Allentown 702 North 22nd Street, Allentown, PA 18104	23-0734200
Jewish Day School of the Lehigh Valley 2313 Providence Street, Allentown, PA 18104	23-7344525
Jewish Family Service of the Lehigh Valley 2004 West Allen Street, Allentown, PA 18104	23-2301360
Jewish Federation of the Lehigh Valley 702 North 22nd Street, Allentown, PA 18104	23-6396499
Temple Beth El 1305 Springhouse Road, Allentown, PA 18104	23-1445421
Temple Covenant of Peace 1451 Northampton Street, Easton, PA 18042	24-0856312



For more information, contact Jim Murth at the Jewish Federation at 610-821-5500 or jmurth@jvf.org





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## COORDINATING DONOR SOLICITATIONS



One of the hallmarks of LIFE & LEGACY is to ensure that our partner organizations remain donor-centric in their solicitations. Asking that each partner organization submit lists of 20 donor prospects will help achieve this goal. It will prevent popular donors from potentially becoming irritated when being solicited by multiple organizations. We request that lists be submitted as soon as possible. The steps for this process are as follows:

- All partner organizations will submit top 20 lists of prospects.
  - This list does not include your Legacy Team members or your board members.
  - The list should be comprised of those prospects most likely to make a commitment to a partner organization. They are generally an organization's most loyal, long-term donors.
  - The partner organizations are in complete control of the names put on their list.
  - No other information about the donors will be requested except their names.
  - The lists will only be viewed by Jim Murth.
  - The lists will be used solely to determine if a donor's name has been included on the lists provided by three or more organizations.
- If a donor name appears on three or more lists:
  - Mr. Murth will set up a conference call including each of the partner organizations to allow them to discuss the donor and reach a consensus to determine the most effective way to approach him or her.
  - Mr. Murth will offer his input if he has information about the donor; however, the final decision will be made by the organizations.
  - It is possible that the consensus achieved will be that representatives from more than one organization could be selected to meet with the donor.
  - Aiding by the consensus reached will ensure a solicitation that is donor-centric while fostering a sense of community among the partner organizations.
- The persons selected to meet with the donor agree to make a case for giving for all of the partner organizations that included the donor on the list.

## LIFE & LEGACY DONOR CONTACT RECORD

Prospect Name	Contact Date	Type of Contact	For Office Use Only
		<input type="checkbox"/> Personal Visit <input type="checkbox"/> Written Correspondence <input type="checkbox"/> Email <input type="checkbox"/> Flyer Distribution <input type="checkbox"/> Professional Advisor Consultation <input type="checkbox"/> Telephone Consultation	LOI Status <input type="checkbox"/> Received LOI <input type="checkbox"/> Thank You Note Sent <input type="checkbox"/> Sent to JVF
Conversation Notes		Donor Recognition <input type="checkbox"/> Yes <input type="checkbox"/> Name Only <input type="checkbox"/> Anonymous	
Follow-Up Date	Follow-Up by Whom	Formalization of Commitment Who Will Contact Donor? Date to Contact Donor Date Formalization Completed	
<input type="checkbox"/> Reminder Entered in Calendar Description of Follow-Up Task			



## LIFE & LEGACY:

### A plan for the future

**WHAT IS THE LIFE & LEGACY PROGRAM?**  
LIFE & LEGACY is a two-year partnership program between the Jewish Federation of the Lehigh Valley and the Harold Grinspoon Foundation to support Jewish community organizations in the Lehigh Valley. Participating organizations will receive training and coaching along with financial incentives to secure legacy gifts.

**WHAT ARE THE SPECIFIC OBJECTIVES OF THE LIFE & LEGACY PROGRAM?**  
The objective of the program is to motivate Jewish organizations to secure after-life commitments from their most loyal donors in order to build endowments that will sustain valued organizations and vibrant Jewish communities for the next generation and beyond.

**HAS THE GRINSPOON FOUNDATION SUCCESSFULLY IMPLEMENTED LIFE & LEGACY IN OTHER JEWISH COMMUNITIES?**  
LIFE & LEGACY was launched in 2012 with seven communities. Today, the Lehigh Valley is one of 43 communities who have been invited to participate in the program. As of December 2016, 36 communities have had conversations with their donors and have secured over \$487 million in future gifts.

**WHAT LOCAL AGENCIES ARE PARTICIPATING IN THIS EFFORT?**  
The Lehigh Valley Jewish Federation will coordinate and administer the LIFE & LEGACY program in the Lehigh Valley. Jim Murth, director of planned giving and endowments for the foundation, will be the coordinator. Jim, with support and assistance from the Grinspoon Foundation, will train the legacy teams from the 10 local community organizations that are participating in this initiative and coordinate the conversations with the volunteers and staff will have with their constituents. Jim will also be tracking the gifts once received. The organizations participating are:

- Congregation Am Hashkalah
- Congregation Beth Shalom
- Congregation Keneseth Israel
- Congregation Sons of Israel
- JCC of the Lehigh Valley
- Jewish Day School of the Lehigh Valley
- Jewish Family Service of the Lehigh Valley
- Jewish Federation of the Lehigh Valley
- Temple Beth El
- Temple Covenant of Peace

# TAKE TIME TO CELEBRATE!

Marketing an event will help keep  
**LIFE & LEGACY** on people's minds



## LEHIGH VALLEY SMASHES LIFE & LEGACY COMMUNITY GOAL IN YEAR 1

244  
COMMITMENTS  
WITH AN ESTIMATED  
VALUE OF  
\$4,688,207



Bruce Ackerman  
Dr. Houston and Lori Andrich  
Karen Abbott  
Richard Adams  
Dr. Scott Bernan  
Dr. Marj Bernen  
Lillian Bernen  
Hen. Alan and Donna Black  
Rance Black  
Ross Bonn  
Wesley Bonn  
John and Ingridse Brown  
Jerrold L. Brown  
Dr. Wilma and Bill Brucker  
Dr. Bill Brucker  
Patricia Carris  
Elizabeth Carline  
Helen Carrine  
Lawrence Carver  
Dr. Jessica Cooperman  
Eileen Davis  
Randy Davis  
Rosa Durham-Thomas  
Walt Durham  
Ruth E. Egan  
Clara and Jan Ehrlich  
David Eiskowitz  
Eli Epstein  
Ruth Mervin Epstein  
Elizabeth Feur  
Amy Feur  
David Feur  
Eileen Fischman  
Robert Fischman  
Dr. Jay and Fran Fisher  
Bernice and Fred  
Fran Fraide  
Renée B. Geller  
John and Susan Geller  
Gary and Patricia Glazom  
Leonard Glazer  
Ned Glazer  
Ruth and David Glazom  
Sandra Goldfarb  
Aly Goldring  
Anita Goldman  
Mark L. Goldman  
Martin Goldman  
Alan L. Goodman  
Harold C. Goodman  
Ben Grossman  
Dr. Harvey and Melba Hakim  
Robert and Bonnie Hammann  
Jerome and Susan Hamman  
Dana Hirsch  
Arthur Hochstetler  
David and Susan Hymann  
Gordon Jacobs  
Rabbi Alan Judd  
Aron Kagan  
Dr. Kenneth and Marjorie Kaholovich  
Irvin Kaplan  
Alan Kane  
Theodore Kane  
Dr. Barbara Katz  
Randy Katz  
Aron and Linda Kohn  
Ken and Sue Krichner  
Dr. Nelson and Andrea Kosky  
Lucy Kosky  
Stuart and Linda Kowitz  
Eileen Kowitz  
Jennifer Lurie  
Scott Lurie  
Lillian Lurie  
Larry Lurie  
Mary Jane Levine  
Dr. Larry and Eva Levitt  
David Levitt  
Dr. Jenni Levy  
Orissa S. Levy  
Paul Levy  
Dr. William and Jane Markson  
Joanne Miller  
Linda Miller  
Michael Miller  
James Mueth  
Linda Newman  
Ally Marston  
Susan Marston  
Audrey Anderson Nofre  
Dr. Michael Nofre  
Dr. Robert Nofre  
Martina A. Obernik  
Irene Peterson  
Robert Smith Phillips  
Dr. Robert and Julia Post  
Gail Post  
Gary Preis  
Sandra Preis  
Patricia Preis  
Barbara Preis  
Barb Reich  
Dr. Richard and Jane Robinson  
Carol Robinson  
Barbara Robinson  
Lillian Robinson  
Judith Rothen  
Dr. Alice and Ron Roskum  
Linda Sams  
Robert Sams  
Ivan Schonfeld  
Mark and Denise Sockolow  
John and Susan Sockolow  
Eileen Spiegel  
Lynn Shankar  
Dr. Mark Shapman  
Alan Shapman  
Robert Michael  
Alice Singer  
David Singer  
Elinor Singer  
Alm K. Slobesky  
Peggy A. Slobesky  
Robert Slobesky  
Ron Tichio  
Marsha Timmerman  
Richard and Susan Timmerman  
Arthur and Barbara Weinreich  
Rabbi Zane  
Larry Zane  
Dr. David and Barbara Ziehm  
Valecko Ziehm  
Kathy Zimmerman  
Drs. Lawrence and Deborah Zilber  
Dorothy Zilber  
Anonymous (20)

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77% of Absconded money

# YEAR 1 CELEBRATION VIDEO

**LIFE & LEGACY:**

QUESTIONS?

