

# Building A Strong Legacy Initiative



*"I found a fruitful world,  
because my ancestors planted it  
for me. Likewise, I am planting  
for future generations."*

*-Talmud Ta'anit 23a*

Tamra L. Dollin \* April 2025 \* Legacy Conference

**Life & Legacy**  
ASSURE JEWISH TOMORROWS

# You

**Have the power to secure the Jewish future!**



***What motivated you to join the effort?***



**Life & Legacy** assists communities across North America to promote endowment giving to benefit local Jewish organizations. Through training, support, and financial incentives, Life & Legacy motivates Jewish organizations to create a culture of legacy giving in their community.

## Program Update



**926** participating organizations

Examples of participating organizations include Jewish community centers, Jewish federations, Jewish day schools, and synagogues

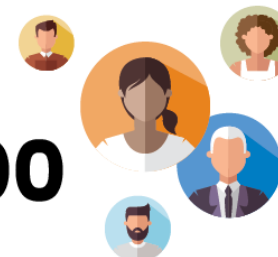


located in  
**75** communities across the United States and Canada

over  
**42,400**  
legacy commitments  
have been signed



by more than  
**33,000**  
donors



**\$252 Million**

is already in organizational endowment funds, providing lasting support that will grow over time



Looking forward, that's over  
**\$1.8 Billion**

Estimated value of all the commitments made through Life & Legacy

for the Jewish future.

# Why Now?





# Why Now?



# Why Now?

- \$124 Trillion transfer of wealth\*
- Opportunity is NOW
- For a strong Jewish community
- Today and Tomorrow



*\*Cerulli Associates, research-based market intelligence for financial industry*

# 4 Steps to Legacy Success

1. Craft a compelling case
2. Get the word out
3. Ask
4. Steward





# Making Your Case

- Who are you? (your mission)
- What impact do you have?
- What will endowment allow you to do?
- How can I make a difference?





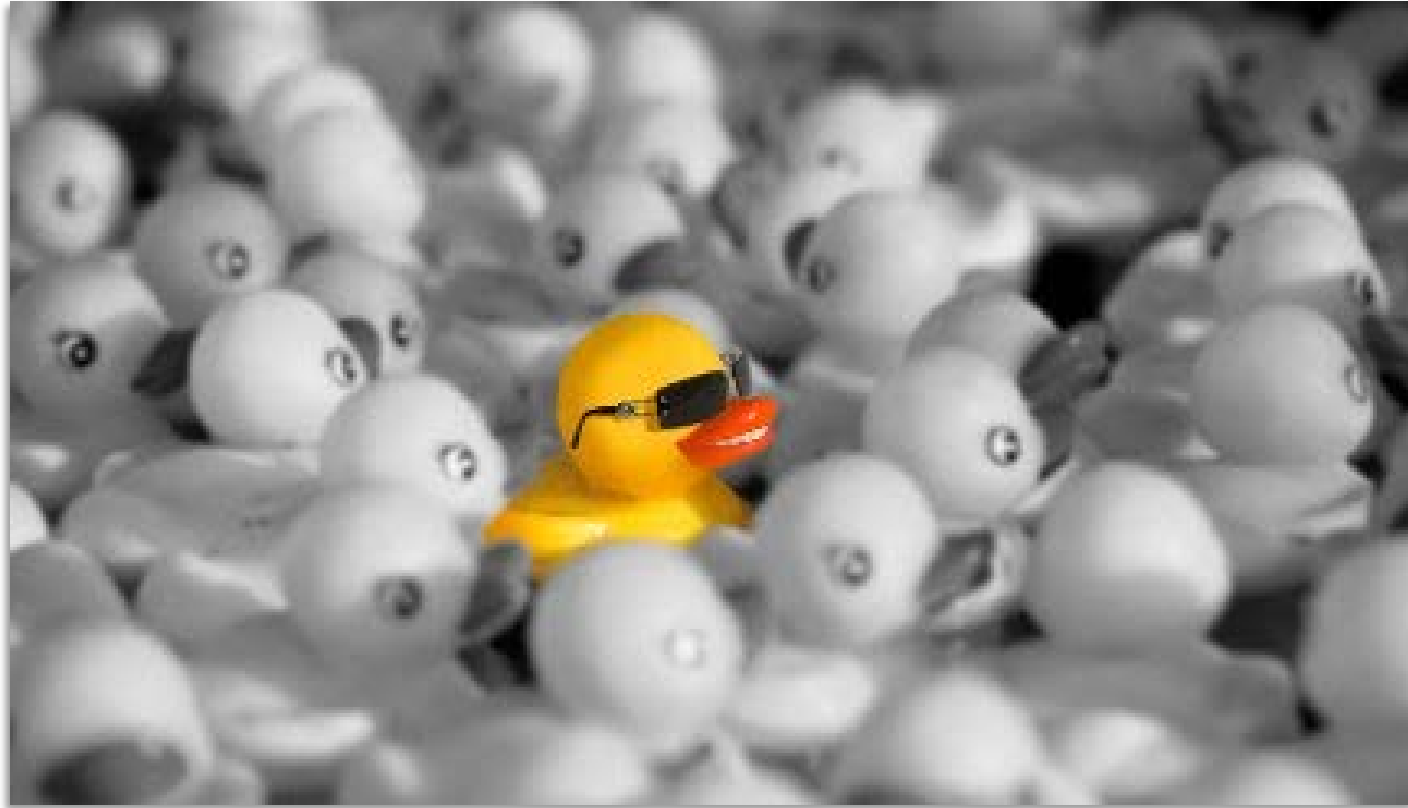
# Legacy Donors



A stylized graphic of a flame or fire, composed of several overlapping, curved shapes in shades of blue and white, located on the left side of the image.

Get the Word Out

# How Do YOU Stand Out?



# Drip the Message



\*Ads \*Newsletters \*Social media \*Visuals \*Cards \*Email and more

**Life & Legacy**



# HGF Template Ads



**Life & Legacy**  
ASSURE JEWISH TOMORROWS

**Pass On Values Instead of Taxes**

With careful planning, a legacy gift from retirement assets can perpetuate values and traditions meaningful to you and reduce the estate tax burden for loved ones.\*

Partner Logo 1

Partner Logo 2

**Life & Legacy**  
ASSURE JEWISH TOMORROWS

Be remembered forever with a gift to (organization) in your will, trust, retirement account, or life insurance policy.

To learn more about leaving a legacy, contact Jane Doe, Director of Giving, [jane@giving.org](mailto:jane@giving.org); 555.555.5555.

\*Seek advice from a financial advisor, attorney, or tax professional to discuss your personal situation.



**Join us in Illuminating the Future**

As you celebrate the Festival of Lights, honor the spirit of Hanukkah by making a legacy commitment and leave a lasting impact on generations to come.

Partner Logo 1

Partner Logo 2

**Life & Legacy**  
ASSURE JEWISH TOMORROWS

With a legacy gift, you ensure that the warmth of Hanukkah continues to spread its glow for future generations.

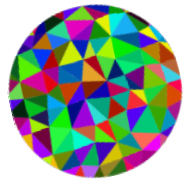
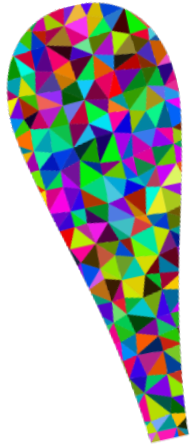
It's easier than you think! Contact Jane Doe, Director of Giving, [jane@giving.org](mailto:jane@giving.org); 555.555.5555 to learn how to create your legacy.

**Life & Legacy**

# Available For Free



# Tagline



**Be remembered forever**

*...in the Jewish community*

**OR**

*...by [your organization]*

**with a gift in your will, trust, retirement  
account or life insurance policy.**




# Visuals

**What will your Jewish legacy be?**

You can ensure a bright future for the Greater Philadelphia Jewish community.

**Ask us how.**



Beth Chaim Reform Congregation  
Congregation Shir Ami  
Jack M. Barrack Hebrew Academy  
JEVS Human Services  
Jewish Federation of Greater Philadelphia  
KleinLife

Kosloff Torah Academy  
Lubavitch of Bucks County  
Maccabi USA  
Main Line Reform Temple  
Temple Beth Hillel Beth El  
Temple Beth Zion Beth Israel  
Temple Sinai

**Life & Legacy**  
ASSURE JEWISH TOMORROWS

**Jewish Federation**  
of Greater Philadelphia

To learn more, visit:  
[Jewishphilly.org/life-and-legacy](http://Jewishphilly.org/life-and-legacy)

**Grow With Us!**



**This Tu B'Shevat Your Gift Can Nurture Our Growth**

**Honor the Past and Support the Future.**  
Become A Legacy Donor with a gift to Temple Sinai in your will, trust, retirement account or life insurance policy.

Temple Sinai



תרומה • עבודה • גמילות חסדים

**Jewish Federation**  
of Greater Philadelphia

**Life & Legacy**  
ASSURE JEWISH TOMORROWS

To learn more about leaving a legacy, contact  
Ari Goldberg, Executive Director, [ari@tsinai.com](mailto:ari@tsinai.com) 215-643-6510 x105  
Karen Petkun, Mary Relles, and Barbara Rosenau - Legacy Co-Chairs



**Life & Legacy**



# Statement Stuffers

**ADOLPH & ROSE LEVIS JEWISH COMMUNITY CENTER:** Please remember the Levis JCC with a gift in your will, trust, retirement account or life insurance policy.

**Share your passion for our community—leave a lasting personal legacy for generations to come.**

Your Legacy Gift helps ensure that the Levis JCC remains a vibrant and strong part of our community for future generations, continuing to:

- Build strong foundations for children & families
- Promote health & wellness
- Embrace Special Needs
- Enrich lives through Art, Culture & Learning
- Connect individuals & families to our Jewish community and help them create their “Jewish journeys”



*To create your legacy today, please contact: Cindy Bergman, Associate Executive Director, (561) 852-3253, [cindyb@levisjcc.org](mailto:cindyb@levisjcc.org)*

**Keep Your Legacy Alive  
With a Gift That Lasts Forever**



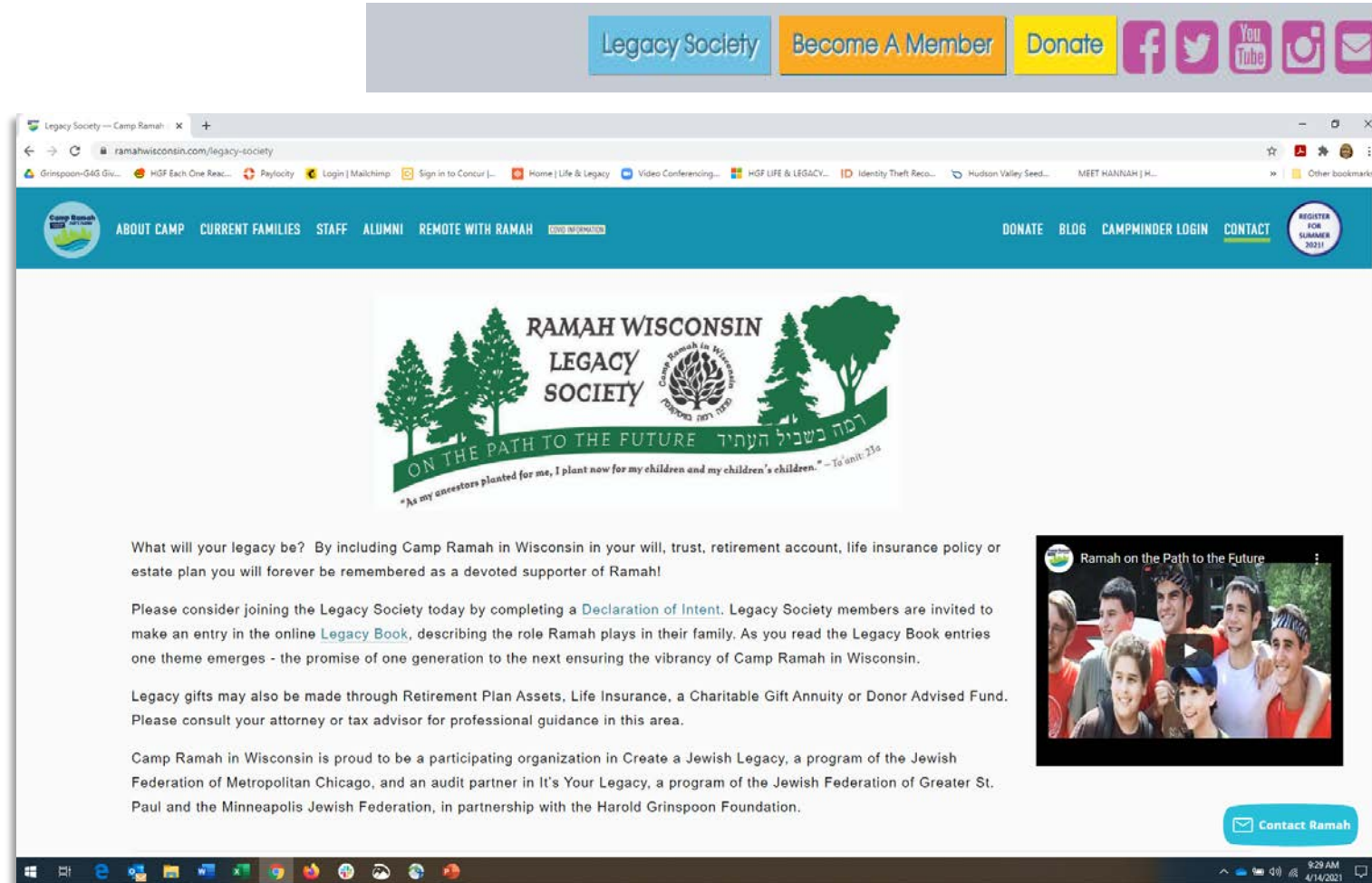
Imagine being able to preserve the Jewish values you cherish for future generations. With a legacy gift to MJDS, you can help our children continue your commitment to tzedakah and tikkun olam.

Create a Jewish Legacy is an endowment program designed to help you create permanent legacy gifts, demonstrating your belief in the continuity of Jewish life for generations to come. In partnership with Jewish agencies, schools and synagogues, this program helps individuals and families create ongoing support for the Jewish causes they care about. All of us, regardless of age, wealth or affiliation, have the ability to help sustain a vibrant Jewish community now and in the future.



**Life & Legacy**


# Website



Include a **FILLABLE** Letter of Intent

Life & Legacy

# Legacy Society






**thank you**  
to those who have plans that  
remember Temple Sinai with a gift  
in a will, trust, retirement account

**L'Dor V'dor  
Legacy Circle**

<b>Tina Alicea</b> Eileen Belleey <b>Berger Family Trust</b> Jeffrey Buchbaum Isaac Cohen <b>Malcolm Cohen</b> Ari Deutschkron Lori Dougherty <b>Barry &amp; Dyana Duman</b> Martin Feigenson Phyllis Feigenson Richard Fogel <b>Richard Frankoff</b> Samantha Garr <b>Lee Gilbert</b> Eric Gladstone	<b>Martin Gold</b> Doug Gold Monika Gold Ricki Greenspon <b>Terri Hirschfield</b> Kim Israel <b>Michael A. Kantar</b> <b>Harry &amp; Laurie Kelman</b> Heather Klein Wendy Kraft <b>Ivan &amp; Marcia Lambert</b> David Land <b>Robert Levin</b> <b>Brian Messing &amp; Karen Bye</b> Maggie Monroy <b>Helene Orenstein</b> Renato Ritter Sharon Roth	Sue Schucker <b>Mark &amp; Helen Schussler</b> <b>Rhonda J. Schwartz</b> Eli Segall <b>The David &amp; Ilana Shapiro</b> Family Trust <b>Lee Sherman</b> <b>Joel &amp; Nancy Shinder</b> <b>Stuart &amp; Amy Stein</b> Ellie Sternquist Laura Sussman <b>Irwin &amp; Dale Thall</b> <b>Stephen Weiner</b> <b>Sandra Wollin</b> 2 Anonymous <small>names in bold have formalized their legacy gift commitment</small>
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Temple Sinai's Legacy Team is delighted to answer your  
questions about this program.  
Please call the Temple office (702) 254-5110



*There is room for  
your name here*

*Please join us!*



**Life & Legacy**

A stylized graphic of a flame or fire, composed of several overlapping, curved shapes in shades of blue and white, located on the left side of the image.

Ask



# Legacy Conversation



**Giving donor the opportunity  
to do something significant  
during their lifetime**

# Practice



# Uncover Their Story

## Ask Questions and **LISTEN:**



- What led you to make your first gift to (organization)?
- What moves you to be such a loyal donor/member/volunteer?
- What is the most meaningful experience you have had through your association with (organization)?
- What is it that we do that you would like to see continue long into the future?
- When you think about having a vibrant community 40 years from now, what do you envision?

# Listen and Learn



# Join Me!

**Will you join me in making a legacy  
commitment to (organization)?**





# Respond



# Common Responses

Donor Response	Your Response
I don't have money right now	A legacy commitment can be made now and does not require any money at the present time. It is an after-lifetime gift
I would love to make a large gift, but I want to make sure my children are provided for	An estate plan that includes your children and other charities you care about can ensure that your children receive an inheritance at the same time as your personal charitable values are honored
I am not wealthy. Legacy gifts are for the rich	A legacy gift can be made by anyone and be for any amount. Legacy giving gives each of us the opportunity to be a philanthropist
I don't have a will	You don't need a will to make a legacy commitment. Two other options are to leave a percentage of a retirement fund or life insurance policy

# Letter of Intent

**LETTER OF INTENT**

**Life & Legacy**  
ASSURE JEWISH  
TOMORROWS

**Jewish Federation**  
of Greater Ann Arbor

**JEWISH COMMUNITY  
FOUNDATION**  
OF GREATER ANN ARBOR

The Talmud says, "As my ancestors planted for me, so do I plant for those who will come after me".  
I/We declare my/our commitment to help sustain a vibrant Jewish community for generations to come.

**Donor Information**

Donor Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ Phone: \_\_\_\_\_  
Email: \_\_\_\_\_ I prefer contact via: Email Phone Text Postal mail  
Donor Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ Phone: \_\_\_\_\_  
Email: \_\_\_\_\_ I prefer contact via: Email Phone Text Postal mail  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Commitment**

☐ I/We have already committed to a legacy gift and it is legally documented  
☐ Today I/We make a/our commitment & will legally formalize it within the next \_\_\_\_\_ months (12 or less)

Donor Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_  
Donor Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_  
*Two signatures required for joint gifts only*

**Organization(s)**

Legacy gifts will be placed into a permanent endowment fund by the organization(s) selected

\_\_\_\_ Ann Arbor Orthodox Minyan  
\_\_\_\_ Beth Israel Congregation  
\_\_\_\_ Chabad House of Ann Arbor  
\_\_\_\_ Eastern Michigan University  
\_\_\_\_ Center for Jewish Studies  
\_\_\_\_ Hebrew Day School of Ann Arbor  
\_\_\_\_ Jewish Community Center of  
Greater Ann Arbor  
\_\_\_\_ Jewish Cultural Society  
\_\_\_\_ Jewish Family Services of  
Washtenaw County  
\_\_\_\_ Jewish Federation of Greater Ann Arbor  
\_\_\_\_ Temple Beth Emeth  
\_\_\_\_ University of Michigan Hillel  
\_\_\_\_ Other: \_\_\_\_\_

**Gift Information - Optional**

\_\_\_\_ Gift in Will or Trust  
\_\_\_\_ Beneficiary of Retirement Plan  
\_\_\_\_ Beneficiary of Life Insurance Policy  
\_\_\_\_ Cash  
\_\_\_\_ Gift that provides lifetime income  
\_\_\_\_ Gift that provides income to heirs  
\_\_\_\_ Other: \_\_\_\_\_

The value of my gift will be \$ \_\_\_\_\_ or \_\_\_\_\_ %

To encourage others to make commitments to the future, I/we permit my name to be listed as follows:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
☐ I/We wish to remain anonymous at this time

*This commitment does not create a legal obligation and may be modified by the donor(s) at any time*

**Contact Information**

Please return this form to a community partner or to the Life & Legacy Manager at  
legacy@jewishannarbor.org or call 734-773-3538

Is the form signed by the donor?

No longer than 12 months until formalization of intent

Is the information readable?

"Are there other community organizations that are important to you?"

# Thank, Document, Report



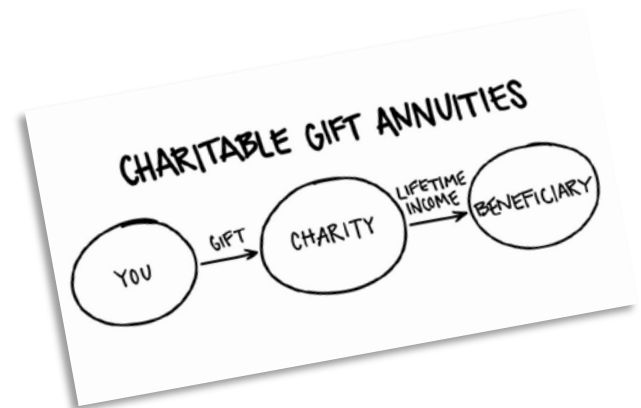
# Formalization



**Legal arrangements to ensure your legacy gift  
will be received by the organization**



# Giving Vehicles



A stylized graphic of a flame or fire, composed of several overlapping, curved shapes in shades of blue and white, located on the left side of the image.

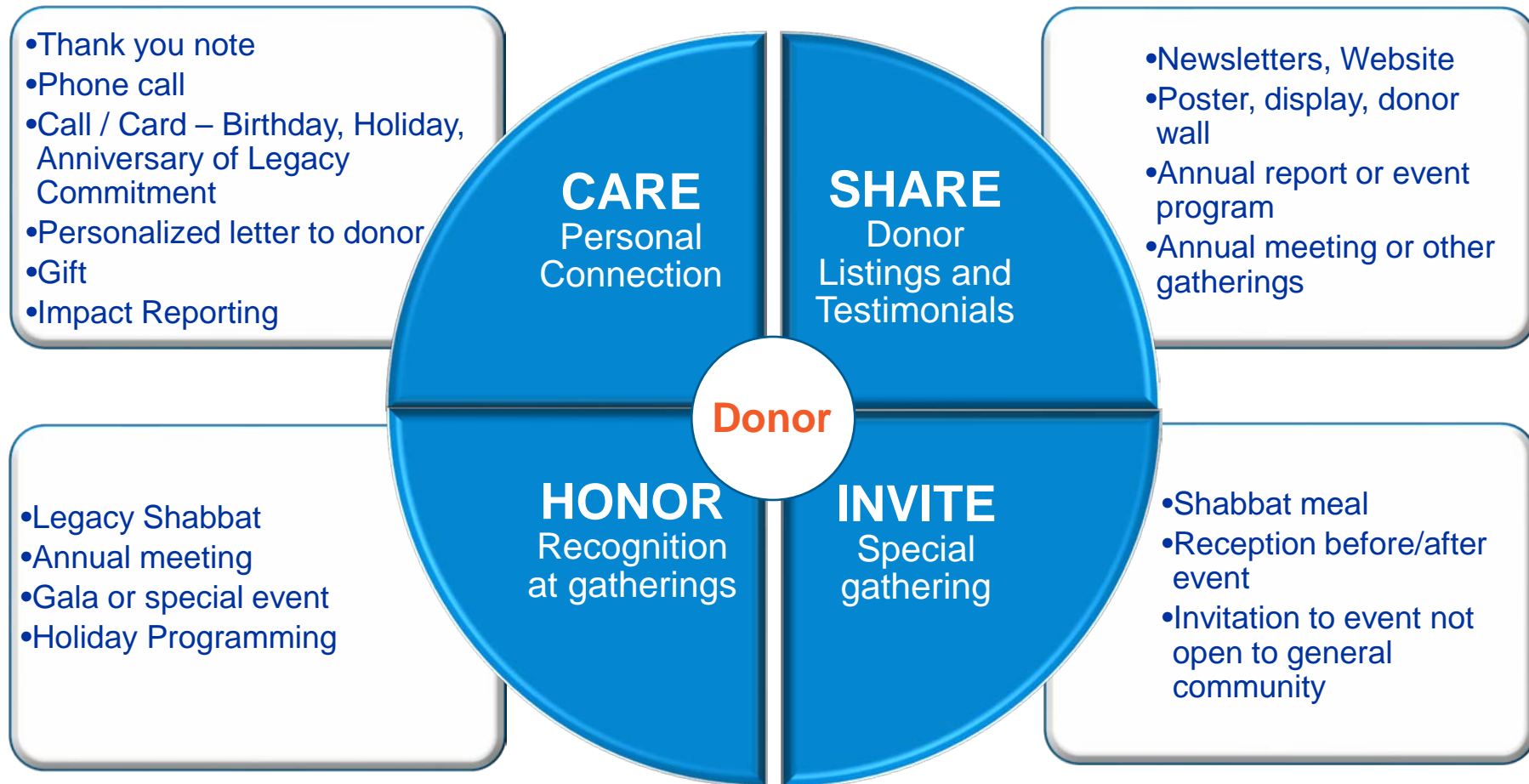
# Steward

# How to Steward?



- CARE
- SHARE
- HONOR
- INVITE

# Effective Stewardship





# CARE



# SHARE

## The Story of ONE



*“Thank you for the Incentive Award from the **Sidney and Irene Levin Family Scholarship and Education Fund** you gave me to attend **Herzl Camp** this summer. I was in a cabin with many of my friends and had a great time.”*

*Sincerely, Ben Borenstein (standing in the center)*

# HONOR

Verbal 'thank you' is also a **Marketing** opportunity





# INVITE

 **The Associated**  
Jewish Federation of Baltimore



THE ASSOCIATED PRESENTS

## Planting Your Legacy

I found a fruitful world because my ancestors planted it for me. Likewise I am planting for my children.  
Talmud, Taanit 23a

You and your family are invited to plant fruit trees in Pearlstone's orchard that were purchased in recognition and appreciation of your legacy commitment to The Associated. Stay with us for light refreshments and tour of the property.

**REGISTER NOW**



April 10,  
3:00 p.m.



Pearlstone Center  
5425 Mt. Gilead Road,  
Reisterstown



Free



**DRIVE THRU**

*Latkes & Legacy*

**YOU'RE THE BRIGHTEST LIGHT  
IN THE COMMUNITY!  
THANK YOU FOR SUPPORTING FUTURE  
GENERATIONS OF JEWISH RICHMOND.**

We invite you to celebrate Hanukkah with the Richmond Jewish Foundation and our Life & Legacy committees by joining us for our first ever "Latkes & Legacy Drive Thru."

**Instructions:** Simply drive around the back of the JCC to the bus loop in front of the R.J.F. building anytime between 10:30 am - 12:30 pm, roll down your window and prepare for service with a smile as you enjoy a special to-go box of homemade latkes and the festive sounds of Hanukkah. (Delay times observed)

What: Latkes & Legacy Drive-Thru  
When: Sunday, December 18th  
from 10:30 am - 12:30 pm  
Where: Richmond Jewish Foundation  
5403 Monument Avenue  
RSVP: By December 14 to  
lauren@rjfoundation.org

Cocktail reception \* Shabbat dinner \* Visitor's Day \* Special gathering

**Life & Legacy**

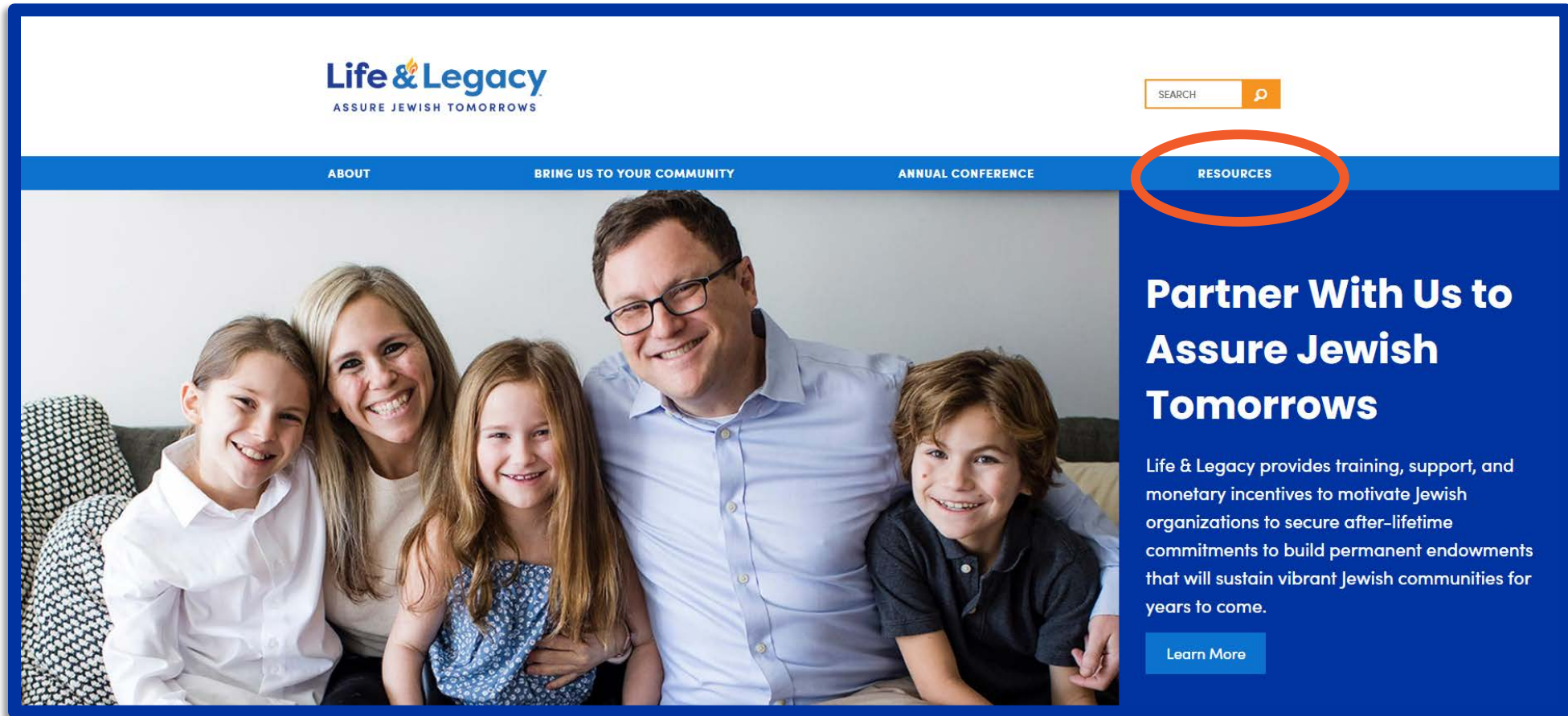




I've learned that people will forget  
what you said, people will forget  
what you did, but ***people will  
never forget how you made  
them feel.***

***-Maya Angelou***

# Resources



The screenshot displays the Life & Legacy website. At the top left is the logo "Life & Legacy" with the tagline "ASSURE JEWISH TOMORROWS". To the right is a search bar with the word "SEARCH" and a magnifying glass icon. Below the logo is a blue navigation bar with four links: "ABOUT", "BRING US TO YOUR COMMUNITY", "ANNUAL CONFERENCE", and "RESOURCES". The "RESOURCES" link is circled in orange. Below the navigation bar is a large photograph of a smiling family consisting of a man, a woman, and three children. To the right of the photograph, on a dark blue background, is the heading "Partner With Us to Assure Jewish Tomorrows" in white. Below this heading is a paragraph of text: "Life & Legacy provides training, support, and monetary incentives to motivate Jewish organizations to secure after-lifetime commitments to build permanent endowments that will sustain vibrant Jewish communities for years to come." At the bottom of this section is a blue button with the text "Learn More".

Life & Legacy  
ASSURE JEWISH TOMORROWS

SEARCH

ABOUT BRING US TO YOUR COMMUNITY ANNUAL CONFERENCE **RESOURCES**

**Partner With Us to Assure Jewish Tomorrows**

Life & Legacy provides training, support, and monetary incentives to motivate Jewish organizations to secure after-lifetime commitments to build permanent endowments that will sustain vibrant Jewish communities for years to come.

[Learn More](#)

[www.lifeandlegacy.org](http://www.lifeandlegacy.org)

Life & Legacy

## CALENDAR

	JAN - MARCH	APRIL - MAY	JUNE - AUG	SEPT - DEC	NOTES (type freely)
GETTING GIFTS	GETTING GIFTS	GETTING GIFTS	GETTING GIFTS	GETTING GIFTS	GETTING GIFTS
Securing Commitments					
BOARD	BOARD	BOARD	BOARD	BOARD	BOARD
Get board support for legacy effort					
MARKETING	MARKETING	MARKETING	MARKETING	MARKETING	MARKETING
Educate around legacy and endowment					
STEWARDSHIP	STEWARDSHIP	STEWARDSHIP	STEWARDSHIP	STEWARDSHIP	STEWARDSHIP
Keep strong relationship with legacy, endowment donors					

# Drop Down Lists

Drop Down Menus				
Getting Commitments	BOARD	MARKETING	STEWARDSHIP	NOTES
Develop Tracking System	Educate on Endowment	Develop Messaging Plan	Evaluate Current Efforts	CARE-something personal
Craft or Refresh Case Statement	Secure Board Commitments	Review Materials	Develop Stewardship Plan	SHARE - testimonials and listing
Write or Refresh Legacy Plan	Thank-You Calls to Donors	Create Materials	Create Legacy Society	HONOR - among organization
Build and Educate Team	Train as Ambassadors	Secure Testimonials	Investor/Impact Report	INVITE - events for donors
Hold Team Meetings	Engage with Donors	Add Legacy to Website	CARE - holiday card	
Secure Team Commitments	Formalize Board Gifts	Add Legacy to Donation Page	CARE - call or write note	
Create or Refresh Prospect List	Onboard New Members	Use Tagline	CARE - small gift	
Have Conversations	Share Endowment Fund Report	Share Impact Story	SHARE - listing newsletter	
Secure Commitments	Share Legacy Initiative Progress	Post on Social Media	SHARE - listing at event/program	
Secure Formalizations	Celebrate Legacy Progress	Share Donor Testimonial	SHARE - donor story	
Integrate into Development Effort	Draft Gift Policies	Announce Legacy Initiative	HONOR - at Legacy Shabbat	
Celebrate Successes	Approve Gift Policies	Visual Display in Building	HONOR - at Gala or event	
Honor Team & Volunteers	Draft Endowment Policies	Newsletter Content	HONOR - public announcement	
	Adopt Endowment Policies	Promote at Event / Program	INVITE - private gathering	
		Email Ask to Specific List	INVITE - tied to larger event	
		Stuffer in Mailing	INVITE - invite to special program	



# Sample

	CALENDAR					NOTES (type freely)
	JAN - MARCH	APRIL - MAY	JUNE - AUG	SEPT - DEC		
GETTING GIFTS	GETTING GIFTS	GETTING GIFTS	GETTING GIFTS	GETTING GIFTS	GETTING GIFTS	
Securing Commitments	Write or Refresh Legacy Plan Develop Tracking System	Build and Educate Team Secure Team Commitments	Have Conversations	Have Conversations		
BOARD	BOARD	BOARD	BOARD	BOARD	BOARD	
Get board support for legacy effort	Secure Board Commitments	Train as Ambassadors	Onboard New Members Share Legacy Initiative Progress	Draft Gift Policies Draft Endowment Policies		
MARKETING	MARKETING	MARKETING	MARKETING	MARKETING	MARKETING	
Educate around legacy and endowment	Develop Messaging Plan	Create Materials Review Materials Use Tagline	Add Legacy to Website Add Legacy to Donation Page	Share Impact Story Visual Display in Building		
STEWARDSHIP	STEWARDSHIP	STEWARDSHIP	STEWARDSHIP	STEWARDSHIP	STEWARDSHIP	
Keep strong relationship with legacy, endowment donors	Evaluate Current Efforts	Develop Stewardship Plan	Create Legacy Society	SHARE - donor story HONOR - public announcement INVITE - invite to special program		



# Inspiration

“It could be said that a great fundraiser is a broker for the sacred energy of money, helping people use the money that flows through their lives in the most useful way that is consistent with their aspirations and hopes for humanity.”

- Lynn Twist

*From Rae Ringel – Using Presence and Communication to Secure Legacy Commitments*