

2025

Life & Legacy Leadership Conference







Beyond Marketing: Educating and Inspiring Legacy Donors

- Welcome!
- Introductions
- Presentation
- Q & A
- Closing Remarks





What is your message?

- Marketing is a means to tell your message
- What is the message you want to share with your community?
- Marketing can present an example, a source of inspiration



LIFE & LEGACY is:

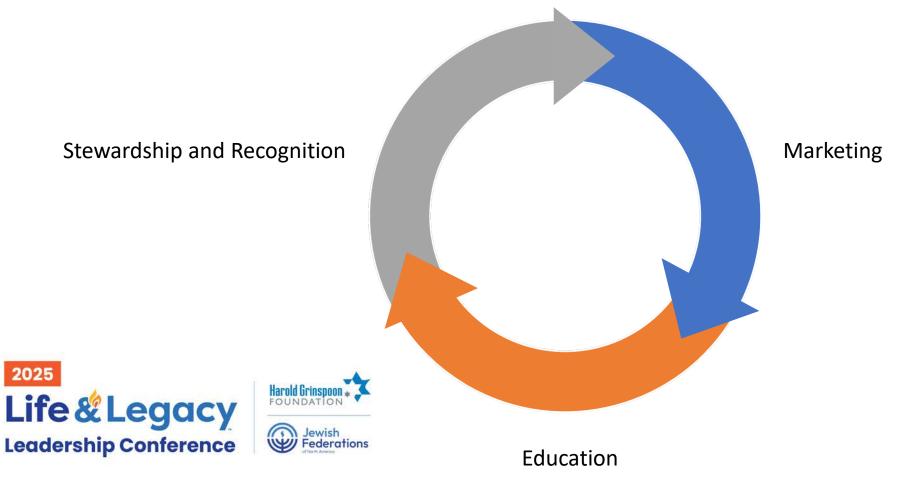
- Attainable for everyone
- A way to assure our Jewish future
- A way to be proactive
- A way to pay it forward
- A way to express gratitude
- A way to honor and preserve your values

Marketing that moves you

- What is an example of marketing that moved you?
 - What did you learn?
 - What did you feel?
 - What was the action you took?

Amy Zacks, Executive Director Jewish Community Foundation of Greater

Life & Legacy Continuum

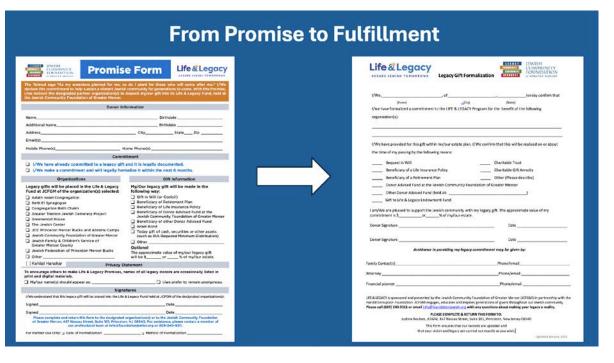


Amy Zacks, Executive Director Jewish Community Foundation of Greater Mercer

Life & Legacy Continuum Example: Book of Life



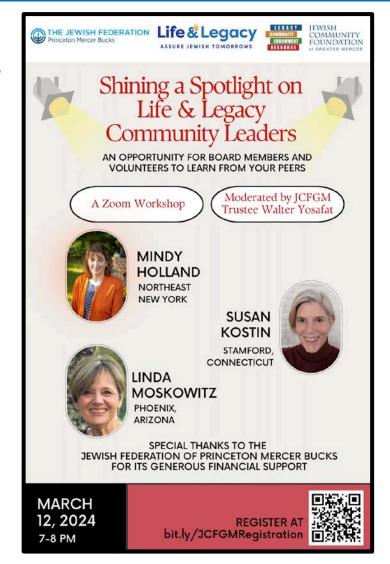




Amy Zacks, Executive Director Jewish Community Foundation of Greater Mercer

Life & Legacy Continuum Example: Community Workshops





Amy Zacks, Executive Director Jewish Community Foundation of Greater Mercer

Life & Legacy Continuum Example: Testimonials, Donor Listings

THANK YOU TO OUR LIFE & LEGACY DONORS

ANONYMOUS (128)
JANET AND RANDE AARONSON
BERNICE AND ABE ABRAMOVICH
AUDREY ABRAMOWITZ
BEATRICE AND LARRY ABRAMS
FRAN ABRAMSON AND HAL ABRAMSON Z'L
USA ADLER AND RABBI BEN JAMIN ADLER
WILLIAM AGRESS
CELESTE AND BRIAN ALBERT

SUSAN AND ROBERT ALBERT
NANCY AND HOWARD ALTER
AMANDA ARENA
THERE AT A DOLL

LYNNE AZARCHI ALEXANDRA AND BARAK BAR-COHEN SHERRY BARSKY

DR. MERYL BAURMASH
CELIA BAVIER

AUDREY AND ADAM BELKIN CHRISTINE AND JEFFREY BERG SCOTT BERGER ELANA BERLINGER HEATHER BERMAN

LAURIE AND SKIP BERMAN MIRA AND ERIC BERZOFSKY MYRNA AND LOU BINDER BEATRICE AND MICHAEL BLOOM GARI AND CHARLES BLOOMER CAMILLE BLOOMBERG

RABBI ADENA BLUM AND SEAN BLUM DEVORAH AND YISROEL BLUMBERG GERRY BOGATZ MADELEINE BOPP Z'L

MADELEINE BUPP 2"L
HAROLD BORKAN 2"L
CHARLENE AND SCOTT BORSACK
DIANE AND JEFFREY BOYARSKY
FRANCINE AND SAMUEL BRAUN
SALLY STEINBERG-BRENT AND

SALLY STEINBERG-BRENT AND DANIEL BRENT DEBORAH AND RANDALL BRET LEAH BRODIE KAREN BRODSKY AND

DONALD LEIBOWITZ DEBRA BROSAN AND MARK MAGERMAN
THE CARCHMAN FAMILY
SCOTT CASTER, MARK CASTER,
JEFFREY CASTER MICHAEL CASTER

MENACHEM CHINN
PERRY CICCOTELLI
PAMELA COHEN
JANET AND HOWARD COHEN
MORTON COHEN
EVE COULSON
LAURIE DINERSTEIN-HURS
PEARL DRELLCH
PRANCES ZETILER EDELMAN

AUDREY AND DAVID EGGER

PAUL FLAND



MAXINE Z'LAND STEPHEN Z"L FARMER RUTH FATH Z"L LYNNE GOLDMAN AND MARK FEFFER PARRIADAM FELDMAN 7"1 SADIFFI DMAN LORI AND MICHAEL FELDSTEIN LAURENCE FIEBER IOFI FINKELSTEIN JOANNE FISHBANE AND RICHARD FISHBANE Z'L JUDITH AND BERNARD FLEITMAN RABBI JOSEPH M. FORMAN LESLIE AND GARY FOX SUSAN AND STEPHEN FOX CARINE AND HARVEY FRAM ANDREW FRANK Z'L JACKIE AND DAN FREEDMAN

RABBI YAAKOV FREEDMAN
MARSHA AND ELIOT FREEMAN
MARSHA FRIEDMAN AND HAROLD HEFT
SHARON BROMBERG AND
RABBI AARON GABER
LINDA AND STEPHEN GALLON
LISA AND JAY GANZMAN
ELIEBN AND RODERT GARBER
ANDREA AND BEN GENEK
LAURA GERY
RONA GILBERT
DINIE SILINITZER GLASSMAN AND
CARL GLASSMAN
RICHARD GLAZER ZL
RACHEL AND DANIEL GOEMAAT

DINE SILNUTZER GLASSMAN AND
CARL GLASSMAN
RCHARD GLAZER Z'L
RACHEL AND DANIEL GCEMAAT
KATHYA GOHR
DONALD GOLD
JAMEE AND MATHEW GOLD
HATHEWN AND HARVEY GOLD
ELANE AND RICHARD GOLDBERG
DAVID GOLDFARB
IRENE GOLDFARB AND
SAMUELGOLDFARB Z'L
NAOMI AND MICHAEL GOLDIN
RICHARD GOLDFEIN
ELLEN GORDON AND GIL GORDON Z'L
FELICE GORDON AND GIL GORDON Z'L
NEIL GORDON
NORMAND MICHAEL GORDON Z'L
NEIL GORDON
DORWA AND PONALD D GORDON Z'L
NEIL GORDON
DORWA AND PONALD D GORDON Z'L
NEIL GORDON

ROBYN AND RONALD GORDON CHERYL AND ALLEN GORSKI ANN AND ANDREW GRANETT BARBARA AND GENE GREEN EVELYN AND LEONARD GROSSMAN RABBI AARON GRUMAN STEVE GRUMBACH MAXINE GURK Z'L LESLIE WERSTEIN HANN AND CHRIS HANN NATALIE AND RDAD HADDINGTON -REBECCA AND DOUGHARRIS MARIA JOSE DE LA HOZ AND ALAN HECHT MINDI AND ADAM HECKENDORN JULIE AND GREG HIRSCH JUDITH AND ALAN HOFFMAN #

SHARON HOFFMAN-MANNING

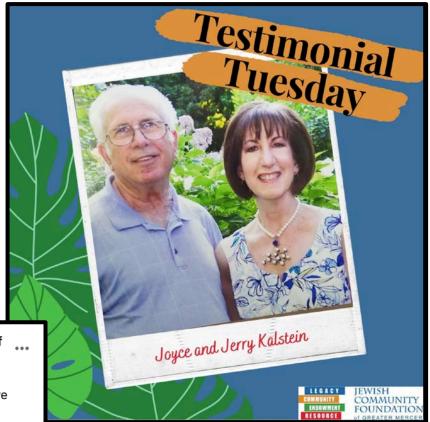
PROMISES TO MORE THAN ONE ORGANIZATION



Jewish Community Foundation of Greater Mercer

November 3, 2020 · 🚱

Joyce Kalstein and her husband Jerry have dedicated years of meaningful service to Jewish organizations in the Princeton area. When LIFE & LEGACY was introduced to our community, the concept immediately resonated with them. Read more about their story here: https://www.foundationjewish.org/.../joyce-kalstein-2/#TestimonialTuesday

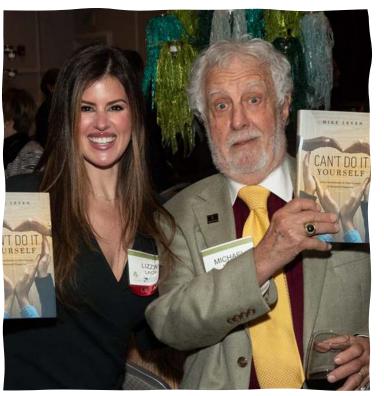




Rachel Rosner

Leveraging community events to advance Life & Legacy initiatives







Step 1- Design Your Program

Always remember to be intentional...

Step 2- Recruit your Co-Chairs and Host Committee

 Connectors are sociable, gregarious, and are naturally skilled at making — and staying connected with friends and acquaintances

HOST COMMITTEE

Co-Chairs: Lisa & Jim Haynor | Tamar & Mark Stern

Beth and Joel Arogeti Joel and Dub Ashner Mara and Justin Berman Leah and Ted Blum Matt Bronfman Michelle and Barton Day Sara and Ross Kogon Lila and Steven Fair Stacey and David Fisher Amy and Chuck Fox Lisa and Seth Greenberg Gail and Michael Habif

Stephanie and Marshall Abes Lisa Haddad and Blair Rothstein Caren and Michael Merlin Amy and Robert Arogeti Lynne and Jack Halpern Gail and Lyons Heyman Michele and David Hirsch Rachel and Andrew Rosner Marcy Bass and Scott Fisher Marcy and Neil Kalnitz Stacey and Mark Rothberg Avery Kastin Arlene and Lee N. Katz Linda and Howard Katz Linda and Mark Silberman Laurie and Michael Kogon Kathy and Jason Evans Lindsay and Ilan Kopecky Sheila and Howard Fagin Debbie and Douglas Kuniansky Debbie and Stan Sonenshine Rebecca and Rabbi Bradley Robin and Howard Sysler Levenbera Amy and Bryan Lewis Erica and Greg Lewis

Stacey and Stuart Shapiro Lisa and Michael Siegel Michelle and Gary Simon Arin and Lorne Tritt Frica and Jordan Tritt Stephanie and Justin Wyatt Helen and David Zalik

Jori and Brett Mendel ATLANTA JEWISH FOUNDATION LEADERSHIP

Jodi and Ross Mansbach

Charlotte and Joel Marks

Ted Blum, Foundation Chair Mark Teichner, Investment Chair

JEWISH FEDERATION LEADERSHIP

Renee Kutner, President & CEO Beth Weiller Arogeti, Board Chair Lindsay Kopecky, Frances Bunzl Chief Advancement Officer



LIFE & LEGACY ORGANIZATIONS

Ahavath Achim Synagogue

Alfred & Adele Davis Academy

Atlanta Jewish Academy

Atlanta Jewish Film Festival

Beth Jacob Legacy Fund

Camp Ramah Darom

Congregation Bet Haverim

Congregation Beth Shalom

Congregation B'nai Torah

Congregation Etz Chaim

Congregation Or Hadash

Congregation Shearith Israel

Epstein School Hillels of Georgia

Jewish Family & Career Services

Jewish Federation of Greater Atlanta

Jewish Fertility Foundation

Jewish HomeLife

Jewish Interest Free Loan of Atlanta

Jewish Women's Fund of Atlanta

Marcus Jewish Community Center of Atlanta

Temple Emanu-El

Temple Kehillat Chaim

Temple Sinai

The Breman

Torah Day School of

AS MY ANCESTORS PLANTED FOR ME. SO DO I PLANT FOR MY CHILDREN.

-TALMUD TA'ANIT 23A

Step 3- Go After Sponsors

You have the **BEST** audience















70-79	22%
60-69	25%
50-59	17%
40-49	19%
Other	17%

Step 4- Have A Post-Event Strategy

Be strategic...





Step 5-Execution

Grow A Legacy
2024

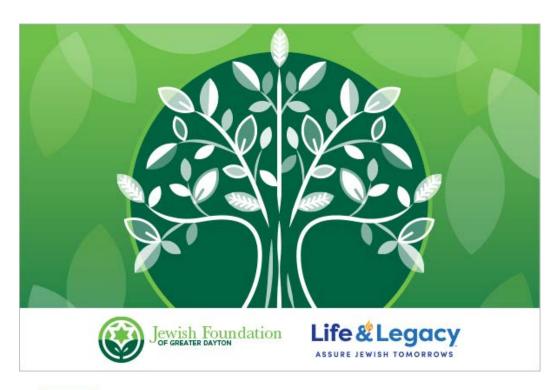


2024 Wins:

- New Letters of Intent
- A new endowment fund for post high school study in Israel
- A \$2M Life Insurance Policy donated
- 6 new Jewish Future Promise Signers
- An Agency moved their endowment to Atlanta Jewish Foundation
- A new \$3M Donor Advised Fund



Janese R. Sweeny, Executive Director of Development and Strategy Jewish Federation of Greater Dayton











CAN WE BUY YOU A CUP OF COFFEE?









We would love the opportunity to grab a cup of coffee with you to discuss the Jewish Community Center of Greater Dayton's LIFE & LEGACY Program. If you're interested, please contact Jane Hochstein, JCC Director, at (937) 401-1545.

LIFE & LEGACY is a partnership between the Jewish Foundation of Greater Dayton and the Harold Grinspoon Foundation in collaboration with the Dayton Jewish community.



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We would love the opportunity to grab a cup of coffee with you to discuss the LIFE & LEGACY program Jewish Family Services is participating in. If you're interested, please contact Tara Feiner, JFS Director, at (937) 401-1546.

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Tips

- Keep it simple!
- Use a variety of:
 - People
 - Places
 - Activities
- Reach out to your LIFE & LEGACY coordinator- they want to help!



		CALENDAR			
Overall Strategy	JAN - MARCH	APRIL - MAY	JUNE - AUG	SEPT - DEC	NOTES (type freely)
ORGANIZATION	ORGANIZATION	ORGANIZATION	ORGANIZATION	ORGANIZATION	ORGANIZATION
Decide on team and lay leadership					
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

ORGANIZATION	BOARD	MARKETING	STEWARDSHIP
Build Team	Educate on Endowment	Develop Messaging Plan	Develop Stewardship Plan
Craft Case Statement	Commit to Personal Gift	Prepare Materials	Evaluate Current Efforts
Create Prospect List	Make Thank-You Calls	Create FAQ, Brochure	Recognize, Thank Donors
Commit to Personal Gift	Train as Ambassadors	Announce Launch	Personal Note or Call
Practice Conversations	Engage with Donors	Add Legacy to Website	Share Testimonial
Develop Tracking System	Visit Camp	Add Legacy to Donation Page	Share Impact Story
Thank Existing Donors	Draft Gift Policies	Use Tagline	Honor Donors at Event
Have Conversations	Approve Gift Policies	Share Camp Impact Story	Acknowledge Donors Publicly
Plan Camp Visits	Draft Endowment Policies	Post on Social Media	List Donors
Capture Summer Impact	Adopt Endowment Policies	Share Donor Testimonial	Send Holiday Cards
Host Donor Visits	Formalize Board Gifts	Plan Alumni Outreach	Launch Legacy Society
Secure Commitments	Educate New Members	Create Investor/Impact Report	Share Investor/Impact Report
Integrate Development Efforts	Integrate Development Efforts	Plan Legacy Society	Send Personal Letter
Celebrate Achievements	Add Endowment Dashboard	Update Materials	Small Gift
Other	Other	Other	Other

Sample

CALENDAR					
Overall Strategy	JAN - MARCH	APRIL - MAY	JUNE - AUG	SEPT - DEC	NOTES (type freely)
ORGANIZATION	ORGANIZATION	ORGANIZATION	ORGANIZATION	ORGANIZATION	ORGANIZATION
Decide on team and lay leadership	Build Team Craft Case Statement Commit to Personal Gift Create Prospect List	Practice Conversations Develop Tracking System Thank Existing Donors Plan Camp Visits	Capture Summer Impact Host Donor Visits	Have Conversations Secure Commitments	Tammy to call Mark to chair
BOARD	BOARD	BOARD	BOARD	BOARD	BOARD
Get board support for legacy effort	Educate on Endowment Commit to Personal Gift	Train as Ambassadors	Visit Camp	Draft Gift Policies Draft Endowment Policies Make Thank-You Calls	Mark to lead
MARKETING	MARKETING	MARKETING	MARKETING	MARKETING	MARKETING
Educate around legacy and endowment	Develop Messaging Plan Prepare Materials Create FAQ, Brochure	Announce Launch Add Legacy to Website Use Tagline	Share Camp Impact Story Post on Social Media	Create Investor/Impact Report Plan Legacy Society Plan Alumni Outreach	Tammy to draft
STEWARDSHIP	STEWARDSHIP	STEWARDSHIP	STEWARDSHIP	STEWARDSHIP	STEWARDSHIP
Keep strong relationship with legacy, endowment donors	Develop Stewardship Plan Evaluate Current Efforts Recognize, Thank Donors		Recognize, Thank Donors Share Impact Story	Share Testimonial Send Holiday Cards Launch Legacy Society Share Investor/Impact Report List Donors	



Q & A



Closing Thoughts



Our Contact Information

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Rachel- rrosner@jewishatlanta.org

Janese- jsweeny@jfgd.net



Thank you!

2025

Life & Legacy
Leadership Conference



