

What is LIFE & LEGACY™?

- A partnership program offered by the Jewish Foundation of Greater Dayton and the Harold Grinspoon Foundation that provides training, support and monetary incentives to help organizations secure meaningful after-lifetime legacy gifts
- Through this program, a strong partnership between the Jewish Foundation, area temples, synagogues, religious organizations and day schools will be solidified

What are the benefits of LIFE & LEGACY™?

- Participation in an educational curriculum that will include speaking with donors, marketing, stewardship and best practices
- Incentive grants to those organizations that meet their goals
- Marketing assistance
- A community wide celebration to honor legacy donors

What are the requirements to participate in LIFE & LEGACY™?

The ability to put together a legacy team made up of senior professional (s) and lay leaders. The legacy team will be responsible for:

- Securing after-lifetime gifts for your organization
- Attending all required trainings
- Submitting reports to the Jewish Foundation on a quarterly basis
- Establishing board approved written endowment policies and procedures
- Strongly considering placing bequests and other gifts received through the LIFE & LEGACY™ program at the Jewish Foundation of Greater Dayton. The funds would be held to benefit your organization.

What are the obligations of the Jewish Foundation of Greater Dayton?

- Implement and fund the program
- Offer incentive grants to organizations that meet their goals
- Provide quality group training seminars, consulting, and coaching in conjunction with our LIFE & LEGACY™ consultant
- Assist each agency to develop a plan and track progress
- Provide LIFE & LEGACY™ marketing materials
- Steward donors and provide organizations with the tools to steward donors in meaningful ways
- Host the community celebration to honor and celebrate all legacy donors

How will we avoid competition amongst organizations?

- The program is designed to eliminate competition and foster collaboration
- Incentive grants are not based on who reaches a particular donor first, or who secures the largest gifts. Incentive grants
- are based on whether a donor leaves an endowed gift to your organization
- Most (not all) donors will leave a legacy gift to more than one organization

How should I select the members for my legacy team?

Have the individuals listed been apprised of their potential involvement? Please consider the following questions when speaking to potential legacy team members. Are they willing to:

- Commit to a legacy gift within the next two year?
- Keep the board apprised of developments?
- Actively participate in legacy conversations with donors?
- Commit to attending LIFE & LEGACY trainings?
- Commit to helping your organization prepare a Legacy Plan?