



Tips for your Legacy Society

Why

- Donors want to associate with those who share their values. Creating a legacy society allows you to honor donors as part of a group of like-minded individuals who value the impact your organization has on their own lives and the lives of others.
- Elevates a donor's commitment and sets them apart from donors who contribute in other ways to your organization.

Creating your organization's "Society"

- Secure approval for the creation of your Legacy "Society" from your board, if required.
- Come up with an appropriate name (and logo if desired) that donors can identify with.
- Define who you will include:
 - LIFE & LEGACY™ donors at the time they sign the LOI or only upon formalization (*we recommend including donors at the point when they sign a letter of intent and being as inclusive as possible*)
 - Donors who have notified you of a legacy commitment prior to LIFE & LEGACY
 - Donors from whom you have already received an after-lifetime gift
 - Donors who have already established endowments for the benefit of your organization
- Determine how you will welcome new members.
- If you are including donors who made commitments prior to LIFE & LEGACY, determine how you will notify them that they are now members of your legacy society and secure permission to list their name.

Announcing creation of your organization's "Society"

Studies show that listing the names of donors is the number one thing that gets others to want to participate, so in addition to society listings stewarding your donors, they are also a great marketing vehicle. You don't have to have a long list of donors to start listing. Once your legacy team members make a commitment, announce the creation of your legacy society and start listing names. (*If all your legacy team members are "major donors" you may want to wait until you have a few other legacy commitments, so it doesn't appear you have to be a major donor to participate.*)

Announcing the formation of your "society" can take the form of a letter from the CEO, Rabbi or legacy chair or article and be placed in your newsletter, local Jewish press, blast email, on Facebook or your website and any other method you use to notify your donors/members of organizational news.

- State the purpose of the society – For example, "We are proud to announce the establishment of the ABC Legacy Society to honor those individuals who have made a commitment to sustaining our future."
- Consider featuring legacy society members in the announcement article with a quote or two connecting how they feel about your organization with their desire to secure the future.

- To encourage those individuals who are not yet members of your society but who may have already made a provision for a legacy gift, include a statement such as, “If you have already included ABC organization with a gift in your will, trust, retirement account, or life insurance policy, please let us know so we can welcome you into our legacy society”.
- Make sure to include the name, phone and email of the individual they should contact for more information.

Increasing Membership

- Honor your legacy society members by listing their names, having them wear special name tags or announcing their names at an event, board meeting or annual meeting. In addition to being good stewardship, these actions help to market the program by encouraging others to join this special group of individuals.
- Contact professional advisors to inform them that you are starting (or already have) a legacy society and let them know you would welcome new members. Share information about the LIFE & LEGACY program and encourage them to say to their clients “Many of our customers like to leave money to one or more organizations. Are there any causes you’re passionate about?”
- Honor your members by listing them alphabetically a few times a year (except for donors who wish to be anonymous) in newsletters, poster in lobby, program for events, annual report, etc. Make sure there is an introductory statement that explains who these people are such as “We honor these individuals who have stepped up to secure the future by leaving a gift in their will, trust, retirement account, or life insurance policy.”
- Publish legacy society member stories/testimonials in print, using social media, or video.
- Highlight impacts of any gifts that are already realized and honor that member for their commitment to the community.

Events

Occasionally bringing your legacy society members together will help them bond as a group and honors them for their commitment

- Events specifically for Legacy Society members can be purely social such as a gathering at someone’s home.
- Events can also have a specific purpose: share stories of people who have been impacted by your organization, time with the Rabbi or Executive Director, time with a performer or speaker prior to another program, dinner prior to legacy Shabbat.
- Invite members to key events of your organization such as annual meetings, graduations, dedications, community-wide programs.

Stewardship

Continue to steward your legacy donor members in perpetuity to insure their legacy commitment stays intact.