

## If all organizations begin seeking legacy gifts at the same time, will this create competition?

The LIFE & LEGACY™ program is designed to eliminate competition between organizations and is intended to result in the creation of after-lifetime gifts that will benefit the entire Jewish community.

Incentives are not based on who reaches a particular donor first, but, rather, whether a particular donor commits to leaving a legacy gift to your organization.

The donor will be asked to leave a legacy gift to ensure the future of the organizations that they care about most. We will use a Letter of Intent that clearly identifies all participating organizations, and donors are free to check all those they wish to include in their gift.

Many donors will choose to support more than one organization, and each organization can count that gift as a commitment.

## Will Jewish Community Foundation continue to solicit legacy gifts?

Foundation is a partner in LIFE & LEGACY™. From its inception, Foundation's mission has been to "develop restricted and unrestricted endowment funds to form a permanent base of support for our local community".

Jewish Community Foundation currently has more than \$5.5 million in assets, and will continue to seek endowment gifts, donor advised funds, and other legacy gifts that will benefit our Jewish community in the future.

## Will a specific person at Foundation administer and coordinate the program?

Yes. Jewish Federation has engaged a professional to administer and coordinate LIFE & LEGACY, and to work closely with its own Legacy Team—and yours!

**Jeff Kripitz**  
LIFE & LEGACY Chair

**Kirk Wisemayer**  
Executive Director

**Ellen Weisman Strenger**  
LIFE & LEGACY Coordinator

## What are the training dates?

Training workshops will take place:

- **January 11, 2018 – Writing Your Legacy Plan**
- **February 27, 2018 – The Legacy Conversation**
- **February 28 & March 1, 2018—Team Meetings**



Harry & Jeannette Weinberg Jewish Community Campus  
501 N Jerome Avenue

TEL: (609) 822-4404  
FAX: (609) 822-4426

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

LIFE & LEGACY™  
comes to the **SHORE**



*As my parents planted for me,  
so shall I plant for the future*  
—Talmud (Ta'anit 23A)



What is LIFE & LEGACY ?

TM

LIFE & LEGACY™ is a capacity building program offered by the Jewish Community Foundation and Jewish Federation of Atlantic & Cape May Counties, in partnership with Harold Grinspoon Foundation's LIFE & LEGACY™ program. It offers training, support, and cash incentives to move organizations to secure meaningful after-lifetime legacy gifts.

This program is special because it creates a strong partnership between Jewish Community Foundation and our local Jewish organizations.

Participant organizations will embark together on a legacy building program that will benefit the entire Jewish community.

All Jewish organizations in our community are invited to apply to LIFE & LEGACY™. Ten to 15 will be selected.

What are the benefits?

Successful in 43 communities nationwide, the program a comprehensive curriculum on topics such as: The Legacy Conversation, Marketing Your Legacy Program; Effective Stewardship; and Best Practices. Participating organizations also receive cash incentive grants, extensive marketing assistance, and a variety of other valuable resources.

## What's required?

Applicant organizations must assemble a legacy team made up of both senior professionals and two to four volunteer leaders, who will be responsible for:

- Securing after-lifetime gifts for your institution;
- Making their own legacy commitment;
- Attending four to six training sessions per year;
- Submitting quarterly Excel reports in a timely manner;
- Meeting the goals outlined in your Legacy Plan;
- Working in cooperation with other local organizations, sharing best practices and working through challenges;
- Establishing board-approved endowment policies and procedures; and
- Placing all bequests and other planned gifts received through the program at Jewish Community Foundation in funds to be held for the benefit of your organization.

## What is the role of Foundation?

Jewish Community Foundation, under the auspices of Jewish Federation, implements the program locally, in partnership with Harold Grinspoon Foundation, together with participating local organizations.

Foundation will coordinate, manage, and administer the program. It will help find the right giving tools for your donors, and, where appropriate, work with attorneys, financial planners, accountants, and others to create and word estate planning documents.

In addition, Foundation will offer incentive grants to each local organization of up to \$10,000 in each of the first two years of the four-year program. Grants will be paid upon successfully achieving defined, measurable goals.

Foundation will offer quality group training workshops, consulting, and coaching to participant organizations, and will assist organizations to develop a plan, implement action, and track progress.

Participating organizations will receive marketing support to promote the program, and templates for individualized public relations material.

## How will we decide?

Each local organization interested in participating will receive an application form, which must be completed and returned **no later than** Friday, December 15, 2017.

Once the forms are returned, a committee will review all applications to determine which local organizations will be selected for participation.

Successful organizations will be notified in writing of their acceptance by **Wednesday, December 27, 2017.**

## Will LIFE & LEGACY compete with Jewish Federation's annual campaign, synagogue dues, and JCC membership?

No. Annual campaign pledges, synagogue dues, JCC membership, and similar obligations to organizations are generally paid from current income. Most people regard these as expenses of daily life.

In contrast, legacy gifts are typically paid by donors to an organization from accumulated assets. The focus of LIFE & LEGACY™ is after-lifetime gifts of these assets.



THE STRENGTH OF A PEOPLE: THE POWER OF

*One Jewish Community*