

LIFE &  
LEGACY™  
Assuring JEWISH TOMORROWS

*A program of the*  
**HAROLD GRINSPOON  
FOUNDATION**

# What is Life and Legacy?

- A 4-year partnership program between the Harold Grinspoon Foundation (HGF) with Jewish Federations to promote after-lifetime giving to benefit synagogues, day schools, social service organizations and other Jewish Entities.
- Life and Legacy is designed to motivate Jewish organizations to secure legacy gifts, steward donors and integrate legacy giving into the philanthropic culture of the Jewish community

# Why?

- Endowments have an increasingly important role in sustaining the future of Jewish Organizations
- Most Jewish organizations have not fully recognized the impact or importance of this type of giving, nor have they sought legacy gifts
- HGF sought to answer the question, “Can Jewish communities be motivated to become proactive in encouraging widespread legacy giving?”
- The answer is YES, with the implementation of Life and Legacy

# Does it Work?

- HGF Jewish Summer Camp Legacy Program – 50 camps have secured over \$70 million in after-lifetime gifts from 3,500 gifts.
- HGF “Create a Jewish Legacy” Western Mass (Springfield) – 19 Jewish organizations have secured an estimated \$20 million in future funds from 800 gifts representing 580 households – and new commitments are regularly received from 540 households.
- LIFE & LEGACY - As of June 30, 2016, in less than 4 years, 35 communities and 12 Hillel Campus Affiliates, representing 391 organizations have secured more than 10,000 legacy commitments with almost \$500 M in estimated future gifts to the Jewish community!

# Where do we start?

- Legacy giving begins with a conversation. Whether a JCC or nursing home, synagogue or overnight camp, Jewish communal organizations and congregations have provided life-enriching experiences to members of the community.
- Those who have been touched want to know that their cherished institutions will be there in the future to benefit the lives of others. Legacy donors want to hear from their organizations, learn about their future plans, and find out how they can help.

# Does Life and Legacy do anything for us?

- The LIFE & LEGACY program does more than encourage Jewish communities to hold these conversations - it provides the structure, training, mentoring and monetary incentives to ensure a Jewish community's success in integrating legacy giving into its philanthropic culture. LIFE & LEGACY is a community-building enterprise that emphasizes collaboration and works to create a united and strong Jewish community for future generations.

# Why does it help?

- We will be helping future generations meet the challenges the the Jewish community will have to cope with
- We commit to L'dor v'or –from "generation to generation"
- We can be the intermediaries for those who come after us to support the needs and emergencies that Congregation Beth Shalom might have to face

# How do we benefit

- We establish a living legacy for the congregation that will assure a Jewish presence in the Mid-Cities
- We will have ongoing funds to sustain the congregation and its programs

# How do I give, and how much is required?

- This type of gift is an endowment
- It can be in a form that you choose
  - CBS can be a beneficiary of a life insurance policy
  - You may make a bequest in your will
  - You can donate stock
- The amount is at your discretion
- It will only become activated as a legacy, not during your lifetime
- Depending on your choice, you may want to discuss the options with your financial advisor

# What steps we we take for Beth Shalom

- The program begins with this introduction today
- Brochures describing the program are available for you
- However, you do not need to be contacted to make a pledge
- You may want to contact us for a no-obligation, confidential conversation

# *Life & Legacy:*

## 5 Reasons You Should Make a Commitment

- 1. Support the Future
- 2. Support the Present
- 3. Create Your Legacy
- 4. Lead by Example
- 5. Save on Taxes

# Our Life and Legacy Team

- Lisa Rein – CBS Board liaison to the FW/Tarrant County Federation
- Ben Weiger – CBS Treasurer
- Pam Sudbury – President
- Ken Licker – Former Controller
- Thressa Lobel – Office Manager