Combined Jewish Philanthropies

Legacy Giving 101
What you need to know.

CJP's Synagogue LEAP

10/19/23

Agenda

- Why now? (Shira Kraft)
- Key legacy giving principles (Shira Kraft)
- Importance of stewardship (Becca Geragosian)
- Principles in action (Jillian Kohl)
- Q & A

An Open Letter from a Community of Holocaust Survivors

…This is not what we expected in this final chapter of our lives, as we contemplate our legacy, the future of Holocaust memory and education, and the future of our people. We write this letter to humanity in sorrow but also in hope…We are living proof that the unthinkable is always possible.

We are also living proof of resilience. That we can rebuild as our fierce determination demonstrates. We must be realistic about the dangers, but we must never despair. That would be a victory for those seeking to destroy us…That is why we are proud of our contributions to fortify new generations to face the challenges that lie ahead. We promised our loved ones we would never forget and never give up. Especially at this darkest of moments, that remains our promise and our challenge to humanity.

“And here came this miracle from a donor unknown to to CJP.”

Shira Kraft

Combined Jewish Philanthropies

Senior Director, Gift Planning and Endowment

Becca Geragosian

Combined Jewish Philanthropies

Director, Stewardship and Recognition

Jillian Kohl

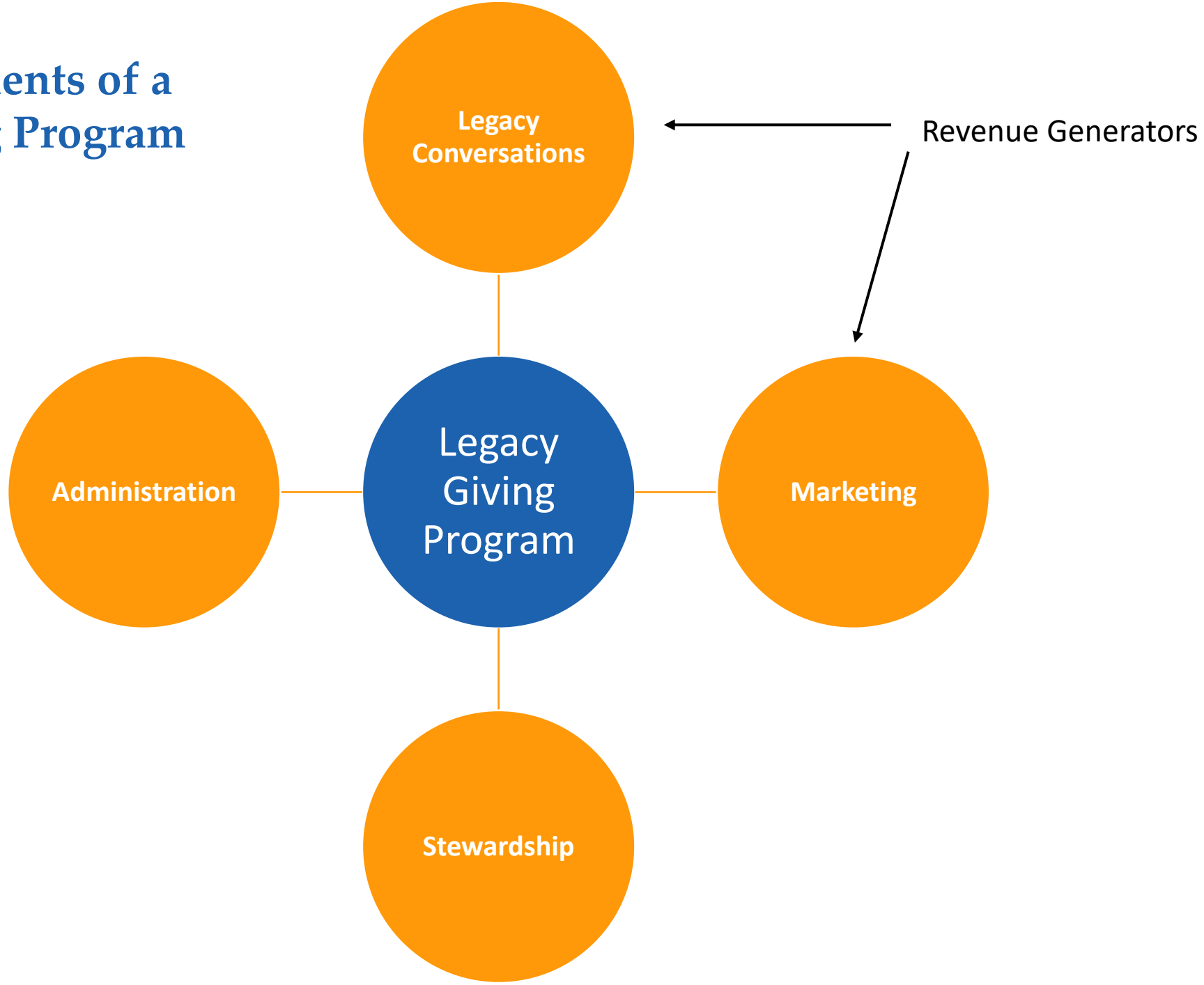
JCC Greater Boston

Chief Development Officer

Key Principle #1:

Simple Does It!

Main Components of a Legacy Giving Program



Types of Legacy Gifts

- Bequest in a will or trust
- Naming a charity as a beneficiary of:
  - IRA
  - Life insurance policy
  - Donor Advised Fund
- Life income gift (Charitable Gift Annuity)

Key Principle #2:

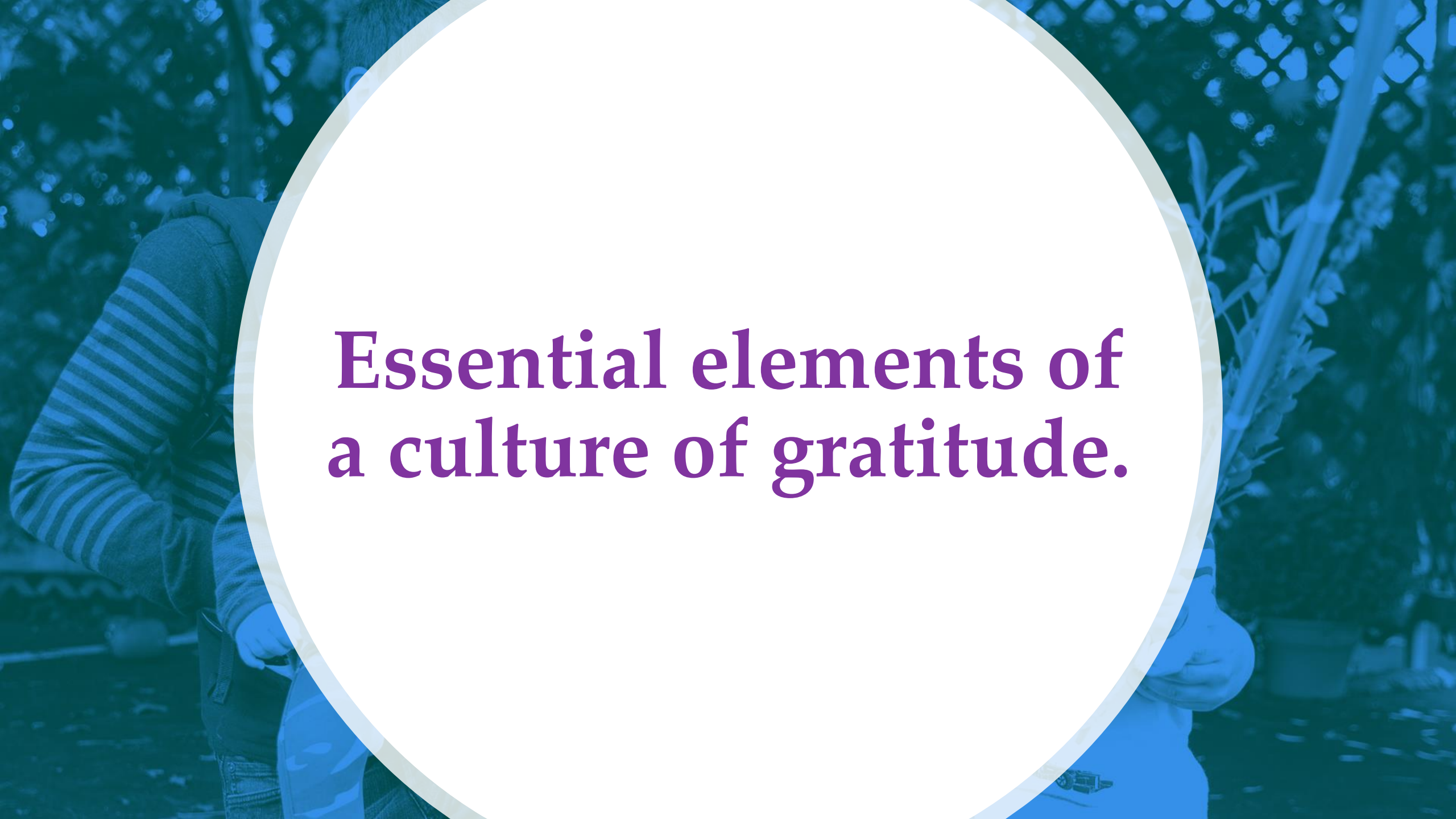
Legacy is a Culture

Cultivate a Legacy Culture

- Build Board buy-in
- Get comfortable with 1:1 legacy conversations
- Integrate broad-based communications

Key Principle #3:

Stewardship is the Staple



Essential elements of a culture of gratitude.

What to do V.S. *How*

Gift acceptance and acknowledgement

Reporting

Engagement

Recognition

cjp Combined Jewish Philanthropies

Principles in Action.

Temple Beth Elohim, Wellesely

cjp Combined Jewish Philanthropies

Q&A