



A quarterly newsletter for the Legacy Teams of Greater New Haven, featuring program news, important dates, and reports spotlighting your success!

IN THIS ISSUE:

- News from New Haven
- High Holidays Incentive!
- Legacy Spotlight: Jewish Federation of Greater New Haven

NEWS FROM NEW HAVEN

Dear Legacy Teams:

Summer is here! We hope you are staying cool and enjoying the season.

After a packed spring that included the annual Life & Legacy® Leadership Conference in Springfield, Massachusetts; our second workshop of the year on June 17, "**High Holidays Marketing and Stewardship**"; and mid-year check-in meetings with the teams, we have a light summer with nothing on the official agenda other than the submission of the **second quarter report (by July 14)**. That doesn't mean the teams need to slow down, though! Summer is a great time to have iced coffee dates with prospective donors, plan a legacy Kiddush or other event for this season or next, and—following last month's workshop—start to think about legacy efforts around the High Holidays.

Those of you who attended our June workshop have already heard the news: On the heels of last year's successful campaign, in which 7 of our teams earned an additional \$360, we are once again offering our High Holidays incentive for 2025! Let's maximize our efforts for the High Holidays. **Your organization will receive an additional \$360 if you incorporate legacy marketing and/or stewardship into your plans for High Holiday messaging or programming (see page 3 for more information).**

So, make a bookmark or an insert to integrate the legacy ask into your annual appeal, give a sermon or talk from the *bimah*, send a *shana tova* card to your legacy donors, or put a High Holidays-themed legacy ad into your newsletter! We would love to give this extra incentive money to all of our organizations.



In April, we attended the Harold Grinspoon Foundation's annual Life & Legacy Leadership Conference, celebrating more than \$1.8 billion dollars raised in legacy gifts for over 75 Jewish communities in North America. It was an exciting and very inspiring two days spent with some 220 professionals and lay leaders, all of whom share a passion for and deep commitment to the future of their Jewish community. Highlights included connecting in person with Kathy Sarlson, National Director of Life & Legacy, and sharing ideas, resources, and recipes for success with our counterparts. The agenda featured engaging workshops on digital marketing and artful donor conversations, and panels exploring emerging philanthropic trends. Shout out to Rachel Bashevkin, veteran BEKI legacy team member, for joining us on Monday! Next year we will once again encourage you all to attend so that we can show off our superstar cohort!

Thank you to those teams who have already met with us or are on the schedule to meet in the coming weeks. As always, please do not hesitate to reach out any time if you would like to meet. We are at the teams' disposal and are happy to talk with you to answer any questions or respond to concerns. To schedule a meeting, call or email Tamara at (203) 266-3080, or tschechter@jewishnewhaven.org.

Warmly,

Tamara

Tamara Schechter

Create a Jewish Legacy Manager

Lisa

Lisa Stanger

Executive Director



Jewish Foundation
OF GREATER NEW HAVEN

CREATE A
JEWISH LEGACY
GREATER NEW HAVEN

High Holidays Incentive for Legacy Teams!

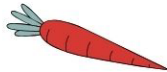


Earn an additional **\$360 incentive** by incorporating
LEGACY into your High Holidays messaging!



~MARKETING~

mailing/stuffer~bookmark~newsletter/bulletin ad



~STEWARDSHIP~

new year card~donor gift~donor list poster



~PROGRAMMING~

sermon/speech~legacy kiddush/oneg~sukkah event



~DIGITAL~

website~social media~emails~zoom banner/chat



~USE THE TAGLINE~

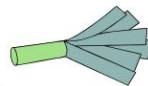
"Be remembered forever by {organization} with a gift in your will,
trust, retirement account, or life insurance policy."



Ask us for donor stickers, personalized ads and
brochures, typeset testimonials, and more!



Submit by **October 31, 2025** to earn this
extra **\$360 incentive!**



Questions? Contact Tamara at
tschechter@jewishnewhaven.org or (203) 266-3080



Shana Tova U'metukah!

LEGACY SPOTLIGHT: JEWISH FEDERATION OF GREATER NEW HAVEN



Steve Saltzman established a LOJE Fund (Lion of Judah Endowment) to endow his late wife Marilyn's Lion gift to the Jewish Federation's Annual Campaign for Jewish Needs. He also established a PACE Fund (Perpetual Annual Campaign Endowment).



"The LOJE Fund was my first," Steve shares, "as it was so meaningful to [Marilyn] that I wanted to make sure it was fully endowed. I set up the PACE Fund afterward to make sure there was an endowment to cover my annual pledges, for the present and into perpetuity."

Steve also established funds at the Jewish Foundation for the benefit of the Jewish Cemetery Association, for the ADL (Holocaust Education), and for the Downtown Evening Soup Kitchen. "This stems from being proud of my Jewish heritage and wanting to sustain it in whatever way I can," says Steve. "In this case, for my New Haven Community that I've been in most of my life."

Looking for ideas and templates for marketing and stewardship?

The Harold Grinspoon Foundation website has lots of resources available to use. See below or contact Tamara:

 Visit
jewishlifelegacy.org

 Click
Resources tab

 Username
Resources

 Password
hgflegacy