



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

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- News from New Haven
- Reminder: Participate in the High Holidays Incentive!
- Upcoming Workshop: October 21
- Legacy Spotlight: High Holidays Incentive Recipients

NEWS FROM NEW HAVEN

Dear Legacy Teams:

L'shanah tovah! It's High Holidays time! And, as you already know, **your organization will receive an additional \$360 if you incorporate legacy marketing and/or stewardship into your plans for High Holiday messaging or programming.** Some of you have already earned this incentive--kol hakavod! For everyone else, there is still time! Submit by October 31 to receive this additional award, and remember, the High Holidays incentive exists alongside the \$360 we offer for a legacy Kiddush or other event, so if you have not yet organized an event for your legacy donors this year, there is still time. See page 3 or more information on the High Holidays incentive.

CREATE A JEWISH LEGACY GREATER NEW HAVEN
Year 3 Totals January 1-July 31, 2025



- \$366,000 in legacy commitments
- \$162,320 already secured
- 21 letters of intent
- 33 donor conversations
- 8 gifts formalized

Q3 report due: Friday, October 17, 2025

Q4 report due: Friday, January 16, 2026

Thank you to all who submitted their midyear reports back in July. As you can see in the table at left, we had a very successful first half of Year 3! Mazal Tov to all the teams. Let's finish the year strong and keep that momentum going. **Your third-quarter reports are due by Friday, October 17, 2025, and your final, fourth-quarter report for the year is due by Friday, January 16, 2026.**

On that note, our third and final workshop of the year, "End-of-Year Tax-Smart Ways to Give," will be held on Zoom on October 21, 7:30–9:00 pm (see page 4 for more information). In this workshop, our own Lisa Stanger presents key principles of good financial planning that you can share with your donors, highlighting tax-smart giving opportunities for the end of the year and the potential impact of new tax laws. Join us so you can start this process before the year draws to a close.



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 Schechter
Create a Jewish Legacy Manager

Lisa Stanger
Executive Director



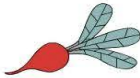
**YOU STILL HAVE TIME TO
EARN THIS \$360 INCENTIVE!
SUBMIT BY 10/31!**



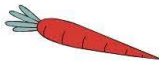
High Holidays Incentive for Legacy Teams!



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



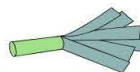
~USE THE TAGLINE~
"Be remembered forever by {organization} with a gift in your will, trust, retirement account, or life insurance policy."



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



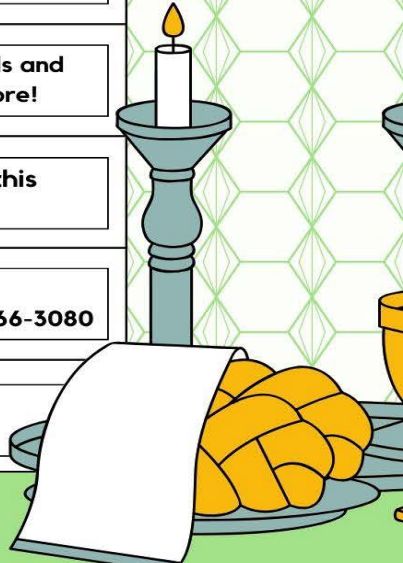
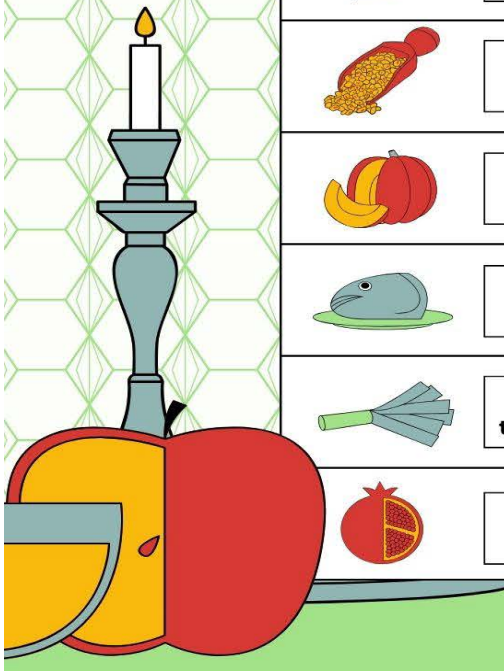
Submit by **October 31, 2025** to earn this extra **\$360 incentive!**



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



Shana Tova U'metukah!



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 hgfllegacy

UPCOMING WORKSHOP

October 21, 2025, 7:30–9:00 pm on Zoom



"END-OF-YEAR TAX-SMART WAYS TO GIVE"

Presented by Lisa Stanger, Executive Director, Jewish Foundation of Greater New Haven

This workshop presents key principles of good financial planning that you can share with your donors, highlighting tax-smart giving opportunities for the end of the year and the potential impact of new tax laws. Join us so you can start this process early—which will ensure that your messaging is thoughtful, timely, and ready well before the year draws to a close.

All Legacy Team members are strongly encouraged to attend.

LEGACY SPOTLIGHT: HIGH HOLIDAYS INCENTIVE RECIPIENTS

For this issue's Legacy Spotlight, we recognize several agencies that earned the High Holidays incentive grant this year! Kol Hakavod! Submit yours by October 31!

CONGREGATION BEKI personalized an ad series from the Harold Grinspoon Foundation's resource templates, publishing the ads in the August, September, and October issues of the synagogue's monthly Bulletin.

TEMPLE EMANUEL included a legacy article in its September-October issue of the *Shofar* newsletter, which served as both a marketing and stewardship piece as it appealed to members to become legacy donors and also named the newest donors to join the initiative.

CAMP LAURELWOOD created a flyer about leaving a legacy to Camp, which was posted to their Facebook page.