



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

Dear Legacy Teams:

Happy Chanukah and happy holidays to all! As Year 3 of Create a Jewish Legacy draws to a close, we want to thank you, our Legacy Team Leaders and Team Members, for all of your hard work this year. Over half of our partners are on track to achieve their goals and receive their incentive grants for this year. **As a reminder, your final, fourth-quarter report for the year is due by Friday, January 16, 2026.** Let's finish out the year strong!

It was wonderful to see so many of you on Zoom for our final Year 3 workshop at the end of October, "End-of-Year Tax-Smart Ways to Give," presented by our own Lisa Stanger. Lisa presented key principles of good financial planning for you to share with your donors, highlighting tax-smart giving opportunities for the end of the year and the potential impact of new tax laws. There was lots of lively discussion and follow-up!

It's hard to believe, but we are heading into the fourth--and final--year of Create a Jewish Legacy Greater New Haven. You should already have your goals for this year; the goals for Years 3 and 4 were sent to you together at the beginning of Year 3. No worries if you misplaced this information; I will reach out soon with a refresher.

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

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

Don't forget your end-of-year report!

Q4 report due: Friday, January 16, 2026

We will kick off Year 4 with our first workshop of the year: "**Sustaining Your Legacy Program**," on **February 9, 2026, at 6:30 pm on Zoom**. See page 3 of this newsletter for more information.

And, please save the date for our **annual community celebration**, to be held on **Sunday, February 22, 2026, at 11:00 am** at the **JCC Beckerman-Lender Building**. We look forward to gathering and celebrating with all of you! Invitations to come after the new year, in January.



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

UPCOMING WORKSHOP

February 9, 2026, 6:30 PM on Zoom



"Sustaining Your Legacy Program"

Presented by Nicole Caine, Community Consultant, Harold Grinspoon Foundation

Year 4 of Create a Jewish Legacy is about a culture shift, in which legacy giving becomes a social norm for our synagogues and agencies. This shift is a critical step in transforming organizations from a fundraising culture to a culture of philanthropy. In this workshop, we prepare to explore how to sustain the legacy program in perpetuity, ensuring that a culture of philanthropy is taking hold.

All Legacy Team members are strongly encouraged to attend.

LEGACY SPOTLIGHT: THE TOWERS AT TOWER LANE



THE TOWERS
AT TOWER LANE



Geraldine (Gerri) Frankel Created a Legacy for The Towers at Tower Lane to Benefit The Towers Garden



"As a longtime volunteer, after my retirement from teaching at Amity High School, I grew to love and appreciate The Towers. My weekly visits and time with residents solidified the importance of The Towers in my philanthropic giving. I was happy to create a Charitable Annuity through the Jewish Foundation of Greater New Haven, which provides income to me in my lifetime and ensures that I leave a lasting legacy to an organization I care deeply about. My annuity will become a fund for gardening to help residents enjoy the benefits of green space, flowers, veggies, and nature for years to come. I am delighted to make an important and meaningful impact in my lifetime and beyond."