





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 AND UPDATES

Dear Legacy Teams:

Happy New Year 2024, and welcome to Year 2 of Create a Jewish Legacy Greater New Haven! We will share official numbers for our community from Year 1 in the next newsletter (these are still being tallied as we speak), but this was a banner kickoff year for us. Kol Hakavod to all of you, and thank you for your hard work on behalf of Greater New Haven's Jewish agencies and organizations. Your efforts are ensuring that our beloved Jewish community will thrive for generations to come.

You have all received your individual goals for Year 2 as well as the Year 2 schedule, which begins next month. The Year 2 curriculum of Create a Jewish Legacy focuses on securing additional letters of intent, developing strong stewardship practices, and continuing to integrate legacy giving into organizational and communal philanthropic culture. Strategies include reviewing legacy

NEWS AND UPDATES (continued)

plans, identifying Year 2 prospect lists, renewing marketing efforts, increasing stewardship activities, and continuing to have legacy conversations.

The first of three workshops for Year 2, "From Letter of Intent to Formalized Commitment," will be held on Tuesday, February 13, 2024, at 7:00 pm on Zoom. All Legacy Team members are strongly encouraged to attend this training. See below (on page 3) for more information about this workshop and a Zoom link. Let's start the year off strong!

As we barrel ahead this year, we won't forget to celebrate all we have accomplished together in Year 1. Please save the date for our Year 1 celebration for Legacy Teams and donors, to be held on **Sunday, April 14, 2024, at the JCC Beckerman-Lender Building.** We can't wait to gather and toast your success!

While it's only January, we want to let you know early that this year's national LIFE & LEGACY® Leadership Conference will be held May 5–7, 2024, in Springfield, Massachusetts. Last year's conference included many workshops and resources for Legacy Team members and lay leaders, and we hope you won't miss out this year. More information to come as we get closer!





We will see you on February 13 on Zoom for our first workshop for Year 2. In the meantime, 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 through any questions or concerns. To schedule a meeting, call or email Tamara at (203) 387-2424, ext. 325, or tschechter@jewishnewhaven.org.

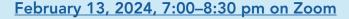
Warmly,

Tamara Schechter

Create a Jewish Legacy Manager

Lisa Stanger
Executive Director

UPCOMING WORKSHOP





"FROM LETTER OF INTENT TO FORMALIZED COMMITMENT"

Presented by Arlene D. Schiff, Interim National Director, LIFE & LEGACY®, the Harold Grinspoon Foundation

Moving a donor from intent to a formalized legacy commitment is the next step in ensuring a commitment comes to fruition. This workshop provides guidance on how to have a follow-up conversation with a committed legacy donor and guide them to action that includes the legal paperwork to formalize their gift. This session includes role-plays, so participants become comfortable having these follow-up conversations.

All Legacy Team members are strongly encouraged to attend.

DATES TO REMEMBER

FEBRUARY 13, 2024 7:00–8:30 PM	WORKSHOP: From Letter of Intent to Formalized Commitment (virtual)
APRIL 12, 2024	1st quarter report due to Create a Jewish Legacy Manager
APRIL 14, 2024 4:00-6:30 PM	Year 1 Celebration for Legacy Teams and Donors! (in person)
MAY 5–7, 2024	2024 LIFE & LEGACY Leadership Conference, Springfield, MA (in person)

LEGACY SPOTLIGHT

Jackie Koral Created a Jewish Legacy for Towers at Tower Lane

My very special mother-in-law, born in Vienna, was unable to escape Europe during the holocaust. She and my father-in-law came to the United States in 1949.

At 95, my husband and I brought her from Manhattan to the Towers. She was terrified. "I don't know anyone there," she said, "and I speak English with a funny accent."

Story continues on next page

LEGACY SPOTLIGHT (continued)

But her fears were soon overcome as she was embraced by the residents and the staff of the Towers where she lived until her death five years later. She is the one who insisted that I get involved with the Towers because she loved it so much, and I did.

It is in her memory and the memory of her husband and mine that I created an endowed fund at the Jewish Foundation. Through this fund, their memories will always live on in perpetuity." - Jackie Koral



Looking for ideas and templates for marketing and stewardship?

The Grinspoon Foundation website has lots of resources available to use.







