



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 2026
- Upcoming Workshop: October 13
- Dates to Remember
- Legacy Spotlight: Jewish Cemetery Association

NEWS FROM NEW HAVEN

Dear Legacy Teams:

We made it to summer! We hope you are all doing well.

Thank you to those who attended our second workshop of the year earlier this month. Our own Lisa Stanger presented on "When a Legacy Donor Dies: Demystifying the Post-Death Process." This workshop came about because many of you had questions about the intricacies of how a legacy gift actually comes to your organization after a donor's passing. We hope you found the training enlightening and helpful. **Our third and final workshop for Year 4 will be held on October 13 at 7:30 pm on Zoom; Lisa will reprise her wildly popular talk from last year on "End-of-Year Planning and Tax-Smart Ways to Give," updated with the latest tips and best practices.** You won't want to miss this: one of last year's attendees called it "the most helpful presentation we've had to date." See page 3 of this newsletter for more information.

As we all know, summer means it's time to start thinking about the High Holidays. Last year, we were so pleased to award High Holidays Incentive Grants of \$360 to 7 of our teams, and we are once again offering this incentive for 2026! **Your organization will receive an additional \$360 if you incorporate legacy marketing and/or stewardship into your plans for High Holiday messaging or programming.** There are lots of ways you can earn this incentive: think about integrating the legacy ask into your annual appeal, send a new year's card to your legacy donors, give a legacy-themed sermon from the bimah, or publish a legacy ad in your High Holidays newsletter. We would love to give this incentive money to all of our organizations!

Jewish Foundation OF GREATER NEW HAVEN **CREATE A JEWISH LEGACY GREATER NEW HAVEN**

HIGH HOLIDAYS INCENTIVE FOR LEGACY TEAMS

EARN AN EXTRA \$360 FOR YOUR ORGANIZATION BY INCORPORATING LEGACY INTO YOUR HIGH HOLIDAYS MESSAGING!

MARKETING

- mailing/stuffer
- bookmark for machzor
- newsletter/bulletin ad

STEWARDSHIP

- new year card
- donor gift
- donor list poster

TAGLINE

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

PROGRAMMING

- sermon/speech
- legacy kiddush/oneg
- sukkah event

DIGITAL

- website
- social media
- emails
- zoom banner/chat

SUBMIT BY OCTOBER 31, 2026 TO EARN THIS EXTRA \$360 INCENTIVE!

As always, please do not hesitate to reach out if you would like to meet. We are at the teams' disposal and are happy to talk through any questions or concerns.

Warmly,

Tamara

Tamara Schechter

Create a Jewish Legacy Manager

Lisa

Lisa Stanger

Executive Director

UPCOMING WORKSHOP



October 13, 2026, 7:30–9:00 pm on Zoom

END-OF-YEAR PLANNING AND TAX-SMART WAYS TO GIVE

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

Back by popular demand and updated with the latest tips and information!

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.

"The most helpful presentation we've had to date!" --Prior attendee

All Legacy Team members are strongly encouraged to attend.

2026

Life & Legacy Leadership Conference

Save the date

October 19–21, 2026
Springfield, MA



DATES TO REMEMBER

JULY 13, 2026	Mid-year report (Q1 and Q2) due to Create a Jewish Legacy Manager (for the period of January 1-June 30, 2026)
OCTOBER 12, 2026	Q3 report due to Create a Jewish Legacy Manager (for the period of July 1-September 30, 2026)
OCTOBER 13, 2026	Create a Jewish Legacy Year 4 Workshop, "End-of-Year Planning and Tax-Smart Ways to Give," 7:30-9:00 pm (Zoom)
OCTOBER 19-21, 2026	Harold Grinspoon Foundation Life & Legacy Leadership Conference, Springfield, MA
DECEMBER 31, 2026	End of Create a Jewish Legacy Year 4
JANUARY 15, 2027	FINAL Q4 report due to Create a Jewish Legacy Manager (for the period of October 1-December 31, 2026)
FEBRUARY 21, 2027	Annual Community Celebration, 11:00 am-1:00 pm, JCC of Greater New Haven

**LEGACY SPOTLIGHT:
JEWISH CEMETERY ASSOCIATION OF GREATER NEW HAVEN**

***Lauren Brown Created
a Legacy for the
Jewish Cemetery
Association of
Greater New Haven***



"Phillip and I were married for 57 years, and a core value we shared was a deep respect for our loved ones that have passed away. We are both from Connecticut (me from Bridgeport, Phil from New Haven), and many of our relatives are buried here. Phil's father used to mow the grass at the cemetery, and it was important to Phil that we visit both our parents' graves before Yuntifs and on Yahrzeits. My parents are buried in Loyalty Cemetery in Fairfield, and the grounds are immaculate. When Phil died in 2023, he was buried at the Independent New Haven Lodge Cemetery on Brockett Place. I visit him often and I was always happy to see how well the grounds were kept. Unfortunately, on these visits I noticed that one of the older cemeteries on the same street showed a lack of care, and it really bothered me. I felt obligated to do my part and leave a legacy gift to the Jewish Cemetery Association of Greater New Haven to ensure that our Jewish community can always afford to demonstrate the respect due to our long departed." —Lauren

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