



# What inspires your legacy giving? Take the challenge and help fuel our Jewish future.

## Inspiring volunteer and donor created community challenge

Richard Roth moved to Ottawa over 20 years ago from Toronto for a business opportunity. He is a former lawyer and married to Ottawa native, Riva Levitan. "The Jewish Community was very welcoming to us. It made us want to be involved," Richard explained, so it wasn't long before they became integrated and active volunteers.

"Personally, I've always felt it is important to give back. I think in Ottawa, because, it's a smaller community, it's even more important. We were welcomed so warmly and we wanted others to have that same experience," he added. "If you want to continue to have a strong community, you have to engage and offer your time."

It was natural that when his sons started at the Ottawa Jewish Community School, then called Hillel Academy, he would get involved. Richard is a former Chair of the Scholarship Committee and a former member of the Executive of the Ottawa Jewish Community Foundation Board of Directors.

For Richard, helping community means securing the community's vibrant future. For this reason, it wasn't long before his volunteerism led him to the Foundation.

"I believe in making an investment for the future and that's what attracted me to the Foundation. If, and when, the community faces challenging times, it is going to be the Foundation that will be there to ensure the community continues to thrive - consider it like the savings bank for future needs."

This is a philosophy he and his wife have instilled in their children. "When our kids were Bar Mitzvah aged, my sons both opened B'nai Mitzvah funds. We appreciated the idea of parents explaining to their kids the values behind opening a fund and giving back. These are the seeds to creating future philanthropists. Both our children are very proud of their funds; having learned both at home, and at OJCS, that tzedakah is a mitzvah they too can happily participate in. The B'nai Mitzvah Club is part of creating future community leaders."

With these values, Richard joined the Board of the Foundation over 10 years ago, first on the Investment Committee then eventually becoming the Chair of the Foundation itself in 2011. It was during this time that he and Riva developed the idea of the Legacy Challenge incentive.

"Riva and I started the Legacy Challenge with the hope of facilitating the conversation around legacy giving through estate gifts. These are gifts a person makes through their will. With proper tax structuring, a legacy gift can help families save money in estate taxes while at the same time, benefiting community."

**"I am proud to say that the Legacy Challenge has raised several million dollars in deferred gifts and it continues to grow..."**



The Legacy Challenge is an ongoing Foundation program that offers up to \$1,000 to cover the professional costs of making adjustments to an individual's will. It has been instrumental in opening the door to conversations about giving in our community that otherwise might never have happened.

"Riva and I accepted the challenge ourselves, and by doing so, we opened the conversation and encouraged others to also do it."

Since its inception, the Legacy Challenge has been hugely successful.

"I am proud to say that the Legacy Challenge has raised several million dollars in deferred gifts and it continues to grow due to the hard work of community volunteers and the current Board and staff of the Foundation. This is very personal to Riva and me - we are so pleased that the Challenge has taken root. It makes us feel we've made a difference."

Richard remains involved in the Foundation's Investment Committee, and is proud of what they have accomplished in managing the community funds. It's a huge responsibility and one he takes very seriously. Richard is also an active volunteer in the broader community. He currently sits on the Board of Directors of the Ottawa Art Gallery and is involved in its Redevelopment Project.

"When it comes to community, you have to give more than you take. Community involvement is one of the most important things in your life. There are four pillars in life: your family, your work, yourself; and your community. And you have to give back to community to make sure you leave it better than when you showed up. It's more than a responsibility. It's almost required. Only by doing that can we guarantee that the next generation will stay on and live here. We have to make sure we protect the future of the community."

**Foundation assists donors in contributing to the long-term financial support of the agencies which serve the Ottawa Jewish community. To find out more, contact **Arieh Rosenblum**, Director of Development, at [arosenblum@jewishottawa.com](mailto:arosenblum@jewishottawa.com) or 613-798-4696 x270.**