



LIFE & LEGACY:

A plan for the future

WHAT IS THE LIFE & LEGACY PROGRAM?

LIFE & LEGACY is a four-year partnership program between the Jewish Federation of the Lehigh Valley and the Harold Grinspoon Foundation to support Jewish community organizations in the Lehigh Valley. Participating organizations will receive training and coaching along with financial incentives to secure legacy gifts.

WHAT ARE THE SPECIFIC OBJECTIVES OF THE LIFE & LEGACY PROGRAM?

The objective of the program is to motivate Jewish organizations to secure after-lifetime commitments from their most loyal donors in order to build endowments that will sustain valued organizations and vibrant Jewish communities for the next generation and beyond.

WHAT LOCAL AGENCIES ARE PARTICIPATING IN THIS EFFORT?

The Lehigh Valley Jewish Foundation will coordinate, manage and administer the LIFE & LEGACY program in the Lehigh Valley. Jim Mueth, director of planned giving and endowments for the foundation, will be the coordinator. Jim, with support and assistance from the Grinspoon Foundation, will train the legacy

teams from the 10 local community organizations that are participating in this initiative and coordinate the conversations which the volunteers and staff will have with their constituents. Jim will also be tracking the gifts once received. The organizations participating are:

- Congregation Am Haskalah
- Congregation Brith Sholom
- Congregation Keneseth Israel
- Congregation Sons of Israel
- JCC of the Lehigh Valley
- Jewish Day School of the Lehigh Valley
- Jewish Family Service of the Lehigh Valley
- Jewish Federation of the Lehigh Valley
- Temple Beth El
- Temple Covenant of Peace

HAS THE GRINSPOON FOUNDATION SUCCESSFULLY IMPLEMENTED LIFE & LEGACY IN OTHER JEWISH COMMUNITIES?

LIFE & LEGACY was launched in 2012 with seven communities. Today, the Lehigh Valley is one of 43 communities who have been invited to participate in the program. As of December 2016, 36 communities have had conversations with their donors and have secured over \$487 million in future gifts.

DOES THE LEHIGH VALLEY JEWISH COMMUNITY HAVE A PRIOR RELATIONSHIP WITH THE HAROLD GRINSPOON FOUNDATION?

Yes, and it has been a most cooperative and beneficial relationship. The Grinspoon Foundation developed the PJ Library program. This program delivers books with Jewish content to children – infants to age 8 – throughout the Lehigh Valley Jewish community. Over 300 children in the Lehigh Valley receive PJ Library books.

WHAT IS A LEGACY GIFT?

A legacy gift is a way for generous and forward-thinking members of the community to express their passion, purpose and commitment to valued Jewish organizations. These gifts, in the form of cash endowment gifts or an after-lifetime commitment, will ensure that Jewish life is vibrant in the Lehigh Valley community for future generations.

HOW WILL THE ENTIRE COMMUNITY BENEFIT FROM THE LIFE & LEGACY PROGRAM?

Since the LIFE & LEGACY program is a cooperative and collaborative community-wide effort, the whole Jewish community will benefit. Legacy team members' conversations are focused on what is important

to the donor; thus, the conversation can result in multiple commitments. For example, an invitation made by a synagogue member may well result in a legacy gift which will benefit the synagogue and one or more local Jewish agencies. Similarly, a conversation initiated by a Jewish Day School supporter may well result in a legacy gift not only for the day school, but also for a synagogue and other Jewish agencies. Most Jewish community members support more than one Jewish cause or organization.

WHO IS A PROSPECTIVE LEGACY GIFT DONOR?

Legacy giving is the most egalitarian form of giving. The LIFE & LEGACY program makes it possible for everyone, no matter their current financial situation, to make a gift that is meaningful to them.

WHAT IS THE DIFFERENCE BETWEEN LIFE & LEGACY AND ANNUAL, CAPITAL AND DUES AND MEMBERSHIP CAMPAIGNS?

Annual campaign pledges, synagogue dues and similar obligations from other organizations are generally paid from current assets. In contrast, legacy gifts are generally paid from accumulated assets in the form of an after-lifetime gift.

As of December 31, 2016, *36 communities*
and 12 Hillel campus affiliates were participating in
LIFE & LEGACY, representing *391 organizations,*

resulting in *12,553 commitments*

with an estimated value of

\$487.5 million in future gifts
to North American Jewish communities.



LEHIGH VALLEY
JEWISH FOUNDATION

THE JEWISH COMMUNITY'S ENDOWMENT FUND
Jewish Federation of the Lehigh Valley



LIFE &
LEGACY™

Assuring JEWISH TOMORROWS

A program of the
HAROLD GRINSPOON
FOUNDATION