



Jewish Community Foundation Fundraising Academy 2010-2011

WELCOME TO YEAR IV

Thursday, September 16, 2010

12:00 – 1:00 p.m.

Let's get together to talk about Year IV of **Leave a Jewish Legacy** and learn about the incentive grant being offered to participating organizations that meet program benchmarks. Leave a Jewish Legacy is a unique, high-quality, results-oriented program with the goal of transforming the culture of legacy giving in Greater Hartford. The Jewish Community Foundation partners with the lay and professional leadership of Jewish agencies, synagogues and day schools to establish bequests and other estate gifts. These bequests will build future endowments for the Jewish community. To date, nearly 400 families have established legacies for an estimated \$36 million to ensure the vitality of our Jewish community.

WORKSHOP: Planned Gift Package – Mix and Match to Maximize

Tuesday, October 26, 2010

12:00 – 2:00 p.m.

Learn about ten ways to address your funding needs in today's environment with **Grant Whitney**, Senior Associate Director of Planned Giving at Harvard University. Weave bequests and planned gifts into your annual fundraising. Grant is past president of the Planned Giving Group of New England and earned an undergraduate degree from Cornell University, and a J.D. from Albany Law School of Union University. He is a member of the Massachusetts and New York Bar Associations. At Harvard, Grant manages the John Harvard Society, the stewardship and recognition society for legacy donors, which has more than 2,500 members.

WORKSHOP: Market Reality – Endowment Update

Friday, December 17, 2010

12:00 – 2:00 p.m.

A return visit by **Michael A. Miller, CFA** managing director of Colonial Consulting LLC, which advises clients, including many community foundation and nonprofit organizations, on a wide range of issues including spending policies and asset allocations. Learn about common types of community investment and major issues to consider including valuation, liquidity, concentration of risk, and whether to integrate these investments into a diversified investment pool.

BROWN BAG: Planning for Community Legacy Recognition

Wednesday, January 19, 2011

12:00 – 1:00 p.m.

Let's meet and talk about ways to recognize our legacy donors and plan a 2012 Florida and Connecticut legacy bash.

WORKSHOP: “Full Spectrum Philanthropy”

Wednesday, March 9, 2011

12:00 – 2:00 p.m.

Steven L. Meyers, Ph.D., Vice President for Planned Giving of the American Committee for the Weizmann Institute of Science holds a Masters Degree in Organization and Management from Antioch University and a Ph.D. from the University of Buffalo. He has published in the *Journal of Gift Planning* and speaks frequently at gift planning roundtables on donor-centered giving and “Planned Giving in the Big Picture.” You will learn how to define, develop and execute strategies that consider outright and planned gifts into your fundraising plans. Steve was a principal developer of best practices for transparently reporting fundraising achievement, and of specialized donor-centered gift applications and agreements which integrate major, planned, current and future gifts, enabling donors to have greater philanthropic impact.

WORKSHOP: Legacy Dialogues – Engaging Younger Donors in the Conversation

Wednesday, April 13, 2011

12:00 – 2:00 p.m.

For younger donors, life income arrangements can act as a supplemental retirement plan, providing guaranteed income to individuals other than themselves, or help reduce estate taxes and capital gains taxes. Bequests and life insurance offer unique opportunities to engage the younger donor. This session, led by **Jeff Lydenberg**, of PG Calc Incorporated, will offer creative opportunities for donors traditionally considered too young to enter into planned gift arrangements.

BROWN BAG: Leave a Legacy® Best Practices

Monday, June 6, 2011

9:00 – 10:30 a.m.

Attorney Danielle Ferrucci, co-chair of Leave a Legacy® Connecticut and a partner at Shipman & Goodwin, LLC, will present on ways to utilize the highly successful national Leave a Legacy materials in your Jewish legacy program. You will hear how various organizations across the state are making use of this initiative and promote charitable bequests to their constituents.