

September 27, 2006

Dear Friends:

On behalf of the Jewish Community Foundation, we welcome you as a partner with the Foundation in the Leave a Jewish Legacy initiative. This letter outlines how the partnership will work and what your participation will involve.

As a Leave a Jewish Legacy partner organization, we expect that you will be responsible for the following:

1. Establishing a Legacy Committee to lead your legacy efforts. Choose one or two volunteers and staff who will dedicate time and energy to promoting charitable bequests and legacies to your donors. Two members of your Legacy Committee are **required to attend workshops** sponsored by the Foundation through the Fundraising Academy and regularly report to your Board on your organization's progress in obtaining legacy commitments.
2. Developing a Case Statement and Legacy Business Plan with the assistance of a consultant from the Foundation's Fundraising Academy. This plan will be a living document that will guide your approach to obtaining legacies and bequests.
3. Asking for Bequest and Legacy Commitments from your constituents. Unlike the Endowment Challenge, you will be talking to your donors about making future gifts and supporting your organization through their estate plans.
4. Transferring Realized Bequests of \$5,000 and more to the Jewish Community Foundation to be held in permanent endowment funds designated for the exclusive benefit of your agency.
5. Participating in the *Voices of Philanthropy—Hartford Jewish Legacies* project to recognize your legacy donors and record their unique personal histories and reasons for leaving a legacy in a permanent bound volume. *Voices of Philanthropy* is a collaborative project of the Jewish Historical Society and the Jewish Community Foundation.

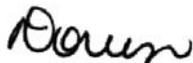
As the sponsor of the Leave a Jewish Legacy project, the Foundation will be your resource in promoting charitable bequests and legacies, including:

1. Working hand in hand with your Legacy Committee to introduce the program to your board and promote legacy giving opportunities to your donors.

2. Meeting with potential legacy and endowment donors to explore gift planning opportunities, consulting with professional advisors and “closing” legacy gifts.
3. Preparing marketing materials to promote the Leave a Jewish Legacy project that you can drop into your newsletters and bulletins. These will include, by way of example, a general brochure and advertisements.
4. Recognizing legacy donors by publishing donor appreciation lists and offering legacy donors inclusion in the *Voices of Philanthropy* collection. Names of those who wish to remain anonymous will not be published.
5. Keeping records of legacy commitments and reporting them to your organization on a regular schedule.
6. Managing charitable funds for the benefit of your organization.
7. Carrying out donors’ legacy intentions in permanent endowments that will ensure that the donor’s wishes are carried out and protected.

Your participation is a vital part of making Leave a Jewish Legacy a successful community-wide effort. We look forward to working with you to build legacies that will sustain our Jewish community for years to come.

Very truly yours,



Doreen Fundiller-Zweig
Executive Director



Deborah Rothstein
Director of Development