



Leave a  
Jewish Legacy

## Program Application

Leave a Jewish Legacy is a three-year initiative of the Jewish Community Foundation to promote charitable giving through wills and estate plans. To apply for participation in the program, please include all the information listed below and on the following pages. Applications must be received at the Jewish Community Foundation office by 5:00 p.m. on January 29, 2007. Incomplete applications will not be accepted.

### Basic Information

NAME OF ORGANIZATION: \_\_\_\_\_

YEAR ESTABLISHED: \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_

\_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_ WEBSITE ADDRESS: \_\_\_\_\_

AGENCY MISSION STATEMENT:

**Key Contact People**

Executive Director (of agency) or Senior Rabbi (of synagogue) who will participate:

NAME: \_\_\_\_\_

E-MAIL: \_\_\_\_\_ PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

Board Chair/President:

NAME: \_\_\_\_\_

E-MAIL: \_\_\_\_\_ PHONE: \_\_\_\_\_

Development Director (if applicable) or other staff who will participate:

NAME: \_\_\_\_\_

E-MAIL: \_\_\_\_\_ PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

Other lay leaders who will participate (at least one must be a Board member):

(1) NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

E-MAIL: \_\_\_\_\_ PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

(2) NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

E-MAIL: \_\_\_\_\_ PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

(3) NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

E-MAIL: \_\_\_\_\_ PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

(4) NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

E-MAIL: \_\_\_\_\_ PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

## **History, Goals, and Challenges**

Briefly summarize your organization's history:

Describe your organization's goals and objectives:

Please list key challenges your organization faces in the next three years:

## **Programs and Services**

Describe your programs, services and numbers served:

Describe your fundraising program and activities and your fundraising goals (in dollar amounts) in 2007 for the following:

ANNUAL GIVING:

PLANNED GIVING AND BEQUESTS:

ENDOWMENT:

CAPITAL CAMPAIGN:

EVENTS:

ANY OTHER SPECIAL FUNDRAISING CAMPAIGNS:

## **Bequest History**

How many matured bequests (funds received by the organization) has your organization received in the past five years?

What was the total value of these matured bequests?

How many current bequests (donors who have notified you that your organization is in their estate plan or will) do you have? Please list the estimated value of these bequests:

Does your organization currently have an endowment or endowment funds?

For each endowment, indicate how it is administered or where it is housed, the current market value, how much it provides annually and how these funds are currently used.

Do you have board-approved endowment or bequest policies?

## **Attachments to Accompany the Application**

- Organization comparative budget for the current and prior fiscal years
- List of board of directors (names, addresses, telephone numbers, email addresses)
- Names and qualifications of key staff
- Most recent fiscal-year-end financial statements (audited if available)
- Copy of IRS determination letter indicating tax-exempt status
- If you have a planned-giving plan, bequest-building and/or endowment plan, please attach.
- If you have planned-giving-marketing materials, please attach.

## **Submitting the Application**

Please provide one complete original and one complete copy of the application, including attachments. Applications must be received at the Jewish Community Foundation office by 5:00 p.m. on Monday, January 29, 2007.