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April 21, 2011

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  Deborah Rothstein
President     Vice President Philanthropy
Bequest Building Program

Introduction

Over the last several years, our Jewish community has taken a major step in building permanent financial resources through endowments. Propelled by the Jewish Community Foundation’s Agency Endowment Program and the successful Endowment Challenge for the Community, a culture of endowment giving is growing across the Jewish community, with new, permanent endowment dollars being raised to sustain our local agencies and synagogues over the long term.

We have much to celebrate, and at the same time, we must face certain challenges. Our community is aging and the transfer of wealth to the next generation is well under way. The annual campaign of the Jewish Federation of Greater Hartford alone cannot meet the increasing demands for operating funds from its beneficiary agencies. Our agencies and synagogues continue to struggle to meet program and capital expenses. Now is the time to seize the opportunity and potential of our community to ensure that the organizations which form the basic fabric of Jewish life in Greater Hartford will thrive for many generations.

Leave a Jewish Legacy is a results-oriented three-year program through which the Jewish Community Foundation will partner with local agencies and area synagogues to promote charitable bequests and planned giving. It emphasizes the importance of gifts from estates and legacies as a key component of fund raising. Leave a Jewish Legacy will maximize the positive relationships organizations and synagogues already have with their donors. It will provide them with the tools and motivation to approach these long-term givers and discuss legacy planning. Universities, hospitals, and other large nonprofits are already active in this arena. It is time for our Jewish community to initiate these important conversations.

Providing for a stable and vibrant future of our community is one of the most important actions we can take as concerned, committed Jews. It is an investment that will be leveraged and paid back many times. The success of Leave a Jewish Legacy will ensure that vital programs will flourish and that agencies and synagogues will be fiscally sound, long into the future.

Why Bequests?

There are hundreds of individuals who would willingly leave charitable bequests but have not been asked. Bequests produce the greatest amount of revenue as a percentage of total fund raising dollars. The statistics are compelling:

- According to Giving USA, bequest giving reached an estimated $19.8 billion and represented 8.0% of total charitable giving in 2005.
- There is a projected wealth transfer of up to $41 trillion over the next 50 years.
• Statistically, the national average bequest is $50,000. At the Jewish Community Foundation, that average is $78,000. If 20 individuals took responsibility for raising five gifts averaging a $50,000 minimum size, $5,000,000 would be produced in the first year of our initiative alone. In reality, many of the bequests will turn out to be larger.

• When bequest donors are thanked and recognized appropriately, other significant gifts follow. Studies show that bequest donors continue to give and increase their annual giving.

• At least one-third of bequest donors make provisions for more than one charity, the average being five to six.

Program Goals

• To secure bequests and other planned gifts from members of the Greater Hartford Jewish community

• To develop strong leadership and skills in securing bequests and endowments

• To build public awareness about the power of bequests and endowments

• To continue making legacies a priority beyond the three-year project period

Eligibility

Local agencies participating in the Endowment Challenge and synagogues with charitable funds administered by the Jewish Community Foundation are eligible to join the Leave a Jewish Legacy program.

Criteria for participation include:

• Completion of the Endowment Challenge for the Community

• Fiscal health and stability of the organization

• High-quality donor base, prospect list and database

• Board buy-in and approval

• Commitment of senior professional and lay leaders to attend all Fundraising Academy sessions and educational programs

Each organization needs to develop a bequest plan that involves:

• Forming a legacy committee

• Identifying a champion

• Drafting a compelling case statement

• Setting legacy/bequest goals

• Creating an ongoing program of donor stewardship and recognition
Training and Education

Over the three-year project period, the Jewish Community Foundation will be conducting both group and individual sessions focusing on the following areas:

- The basics of bequests
- Bequest solicitation
- Planned giving opportunities
- Marketing legacy gifts to donors
- Stewardship of donors

Role and Responsibilities of the Jewish Community Foundation

The Jewish Community Foundation will be responsible for:

- Guiding the participating organization in establishing specific goals, implementing action plans and tracking progress
- Offering high quality group and individual training seminars
- Providing consulting services on charitable gift planning, including bequests, retirement plan designations, life insurance and other gift vehicles
- Providing marketing and advertising for the program including ads for the Jewish press, brochures, sample letters, and seminar content for donors
- Convening regular meetings to share successful strategies and challenges among participating agencies and synagogues and promoting collaboration between them
- Assisting in solicitation and “closing” of bequest asks
- Educating and training a significant number of volunteers as solicitors
- Providing recognition to donors and ongoing stewardship of donor relations
- Managing agency and synagogue charitable funds

Role and Responsibilities of the Participating Agency or Synagogue

The participating organization is responsible for:

- Creating a written bequest plan with meaningful and measurable goals for success during the three year project period
- Engaging senior professional and lay leadership in the program
- Reporting on progress
- Transferring realized bequests to the Jewish Community Foundation
Conclusion

The passing of values from one generation to the next is one of the most fundamental tenets of Judaism. Now is the time to fulfill our obligation of l’

dor v’dor. As our parents and
grandparents have done before us, we must now plant for our children. Let us all—individuals,
families, agencies, synagogues—come together to ensure a flourishing Jewish life in Greater
Hartford for generations to come.
Frequently Asked Questions

Who can participate in the Leave a Jewish Legacy initiative? Any member of the Greater Hartford Jewish community may participate by making a promise to leave a future gift for an agency, a synagogue or the Jewish community at large.

Is there a minimum legacy gift required? There is no minimum promise level to participate in the program. A legacy gift of any size is graciously accepted. Many people leave a percentage of their estate, or a specific dollar amount.

Will a donor’s name be associated with the legacy gift? Donors will be recognized publicly for their commitments, unless they choose to remain anonymous.

Is a promise to leave a legacy legally binding? No, it is a commitment to provide for future generations. Donors may change their plans at any time.

What kind of documentation of the legacy gift is needed? The Jewish Community Foundation does not require any legal documentation of a legacy gift. However, we encourage donors to share a copy of the relevant portion of their wills or trust documents to ensure that their charitable wishes are properly carried out.

How will donors be recognized? Donors will be listed as participants in the Leave a Jewish Legacy initiative. If the bequest is directed to the Foundation, they will become members of the Foundation’s Legacy Society. Donors who participate in the Leave a Jewish Legacy program will be invited to submit a testimonial about their legacy plans for the Voices of Philanthropy—Hartford Jewish Legacies collection.

When should donors start to think about leaving a legacy? Jewish tradition teaches that one of our key duties is to make the world a better place for future generations. The time is always right to think about how one wishes to be remembered.

Can a donor support more than one agency? Yes. Donors may leave a legacy through the Jewish Community Foundation to support the many causes they care about. Many people want to support multiple agencies in the Jewish community, as well as non-Jewish organizations.

Who tracks the legacy promise? Upon notice of a bequest intention, the agency or synagogue will complete a Bequest Intention Transmittal Form (see Section 9) and forward it to the Jewish Community Foundation. The Foundation will record the promise in its database and send out acknowledgments to the donor and agency. Each organization should also keep a record of the bequest intention.

What about the donor’s professional advisors? The Jewish Community Foundation can work with donors and their professional advisors to plan a legacy that furthers the donor’s unique financial and charitable goals. Foundation professional staff is available to meet and consult with advisors throughout the process.
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: ___________________ FAX: ______________

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:
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.
Ten Steps to Success in Bequest Building

1. **Obtain Board approval for your Leave a Jewish Legacy program.** In order for your bequest program to succeed, the commitment and involvement of your Chair, Trustees and Executive Director is critical. Commitment to the program means not only philosophical support for the concept of seeking bequests, but also a commitment of resources (staff, time and money) to make the program work. Board members should be expected to participate by making their own bequests and by identifying and cultivating bequest prospects.

2. **Identify and enlist a champion for your Leave a Jewish Legacy program.** Find a specific individual with clout in your agency who has a special interest in the legacy program and who can act as your champion with Board and management. A committed champion can often open doors and keep you on track in marketing and administering your program.

3. **Recruit a Legacy Committee.** You must establish a Legacy Committee with a special interest in the Leave a Jewish Legacy program. A group consisting of four or five people is ideal. The job of the Committee is to promote awareness and interest in the program, to help develop the case statement and marketing materials, to identify prospects and assist in personal solicitations, to help develop policies and procedures and, generally, to work to insure that the program moves forward on schedule.

4. **Review and, if necessary, update your Case Statement.** Donors want to know why they should support your cause. They do not give just because you are a “good” agency doing “worthwhile things” in the community. You have to show that you are providing specific programs of benefit that people will care enough about to be willing to support. You have to show them how their support can make a real difference for the fulfillment of your mission, now and into the future. Your completed case statement can be posted on your website.

5. **Establish goals and objectives for your program.** Using the bequest plan outline provided in your handbook, develop specific goals for how many bequest commitments you want to obtain per quarter. Also establish marketing goals, e.g. how many drop-in ads about legacies you will publish in your bulletins.

6. **Identify your best prospects for bequests.** Review donor/prospect lists. A simple way to identify your best prospects is to FLAG your lists. Look for:
   - **Frequency of giving.** Donors who give regularly show their interest.
   - **Longevity of giving.** Donors who give consistently over time, even in small amounts, are the best prospects for bequests.
   - **Age.** People think about wills and estate planning starting in their fifties and beyond.
   - **Gender.** Most bequests come from women—who outlive the men of their generation by an average of 7 to 9 years. Women who have been involved with your agency over the years are the most likely to include your agency in their wills.
7. **Work with the Foundation to develop a bequest prospect plan.** Specify exactly what you will do, how you will do it, and what the timetable will be—and then take the steps necessary to accomplish your goals. Here are some examples of where to start:

A. Identify five (or six, or ten) individual prospects whom you will visit personally to discuss the Leave a Jewish Legacy program.

B. Make a list of all of the written materials that you now send to individuals (for example, annual appeal letters, special fundraising appeal letters, newsletters about what’s happening in your agency, annual reports, quarterly magazines, information on special events, etc.). Look for ways to include bequest information—personal stories of people who have included your agency in their bequest plans to motivate others to act.

C. Develop a website for your agency and link it to the Jewish Community Foundation’s website (www.jcfhartford.org) so that your constituents can learn more about bequests.

D. Send a bequest mailing to targeted prospects. The Foundation will provide materials that you can send to targeted prospects with a cover letter and reply card.

E. Always include a reply card with your materials. Make it easy for a donor to respond—and to indicate interest. Once a person sends back a card, make sure to send the materials requested, and then follow up with a phone call within two weeks.

F. Make sure that your materials include the correct legal name of your agency and of the Jewish Community Foundation so that the donor’s attorney can draft the bequest language accurately.

8. **Follow up personally on all responses.** Follow up on each response with a telephone call, and a personal visit when possible. Discuss your agency, your mission, and the prospect’s special interests in it. Find out as much as possible about the prospect so that you can continue to build the relationship.

9. **Decide how you will recognize and continue to cultivate bequest donors.** Remember that continuing cultivation and recognition will be critical to the success of your program. You want to keep your current donors involved and happy and count on them to encourage others to join in the program.

10. **Most important of all, KEEP AT IT!**
The outline below provides an overview of bequest program planning. Tips and considerations for each component appear on the pages that follow.

I. The Case Statement
   - The key question: Why should someone leave a bequest to your organization?
   - What is the value of your organization in the community?
   - What are the values your organization stands for?
   - Describe the impact of bequest/endowment building on your organization.
   - Identify three benefits of bequest/endowments to your organization.

II. Management Plan
   - Who is responsible for the plan? (the person in charge can be professional or staff)
   - To whom do they report?
   - Who will track gifts, documents and records?
   - Who will communicate bequest gifts and intentions to the Jewish Community Foundation?
   - Who will be responsible for stewardship and relationship building with your new bequest donors?

III. Identify and Describe Prospects
   - Individuals/families having a connection with your organization
   - Individuals/families demonstrating certain giving patterns and history
   - Individuals/families with personal characteristics favoring bequests
   - Individuals/families and friends who have used your services or who have been helped by your organization

IV. Marketing Plan
   - Identify target markets.
   - Identify best communications vehicles.
   - Integrate Leave a Jewish Legacy materials into your organization’s communications and marketing plans.

V. Recognition and Stewardship
   - Establish thanking and acknowledgment procedures.
   - How are you going to publicly recognize?
   - How will you communicate regularly and be inclusive?

VI. Setting Goals
   - Years 1, 2 and 3
Tips and Considerations for Developing a Bequest Plan

I. Developing Your Case Statement

Your organization’s case statement should not exceed one page in length.

Brainstorm and organize your key messages.

✦ Why a bequest?
✦ What is the value of your organization in the community?
✦ What are the values your organization stands for?
✦ What impact will bequest/endowment building have on your organization?
✦ What will be the benefits of bequest/endowment to your organization?

Put it in writing.

A written “case” becomes your communication guide – whether it be developing a one-page outline to help your volunteers talk about bequest/endowment giving, to writing marketing letters, newsletter articles, etc.

Write your “case” from the donor’s point of view. Use the second person, e.g., “You can make a difference.”

Make it easy to read. Use larger font, family stories or testimonials, quotes, pictures, white space.

Always include contact information, confidentiality commitments, and legal disclaimers.

Motivate people to make bequests by reminding them why in your communications:

✦ “To perpetuate the vitality and purpose of organizations you care about”
✦ “To continue your support of the values and causes you believe in”
✦ “L’dor v’dor: To pass the torch to family and future generations”
✦ “To create a lasting tribute to honor family, friends and loved ones”
✦ “Tzedakah: To give something back”
✦ “Tikkun olam: To leave the world a better place than you found it; to make a difference”
✦ “To feel part of something greater”
✦ “To live on through your good deeds”
✦ “To reduce your estate’s exposure to taxes”
**Important Facts for Developing a Case Statement**

*Emphasize your mission.* The most motivating factors for charitable bequests are a desire to support the charity, a belief in its mission, a desire to accomplish something and have an impact.

**Reasons Donors Give for Making a Charitable Bequest**

- Desire to support charity: 97%
- The ultimate use of the gift by the charity: 82%
- Desire to reduce taxes: 35%
- Long-range estate and financial planning issues: 35%
- Create a lasting memorial for self or loved one: 33%
- Relationship with a representative of charity: 21%
- Encouragement of family or friends: 13%
- Encouragement of financial or legal advisors: 12%

From NCPG, *Planned Giving in the United States 2004*
II. The Management Plan

Brainstorm and organize:

❖ Who is responsible for the plan? (the person in charge can be professional or staff)
❖ What are the roles of different team members?
❖ To whom do they report?
❖ Establish an internal timeline for solicitations—starting with leadership team members, then Board and donors.
❖ Who will track gifts?
❖ What system will work over the long term? When bequests mature over the next 30 years, will the original information be easily accessible?
❖ Who will communicate bequest gifts to the Jewish Community Foundation and submit the completed Bequest Intention Transmittal Forms?
❖ Who will be responsible for ongoing stewardship and relationship building with your new bequest donors?

How will the team work with the rest of your organization?

❖ What other individuals, board, staff and or volunteers need to know about the plan? Be part of the plan?
❖ When and who will present to the rest of the Board on endowment progress? How often?
III. Identifying Prospects and Solicitation Strategies

Most of your bequests will emerge from four groups.

1. **Individuals/families who have a connection with your organization:**
   - Board members
   - Former Board members
   - Past Presidents and other officers
   - Committee members
   - Staff and former employees
   - Volunteers
   - Members
   - Alumni/ae
   - Users/recipient of your services

2. **Individuals/families who demonstrate certain giving patterns and history:**
   - Closest and most loyal families—including those with multigenerational involvement
   - Consistent givers over 10+ years
   - Supporters of special campaigns—capital, endowment, etc.

3. **Individuals/families who have personal characteristics that favor bequests:**
   - Couples over 50, with or without children
   - Women
   - Individuals who give $5,000 each year
   - Widows
   - Seniors

4. **Individuals/families and friends who have used your services or who have been helped by your organization:**
   - Clients or patients
   - Congregants
   - Alumni
   - Family members, e.g., grandparents
   - Patrons
Important Facts for Prospect Identification and Solicitation

For maximum cost effectiveness, target current donors.

- 75% of bequest donors have made a donation to the same charity and the size of the current gift has no relationship to the size of the bequest.
- Current donors are the best bequest prospects.
- Nongivers account for 25% of bequest donors.
- 79% of bequest donors have a direct relationship with the charity named in their bequest.

Bequest Donors’ Affiliation with Charity

- Member ............................................................................................ 31%
- Charity benefited you/family/friend................................................. 24%
- No affiliation ..................................................................................... 21%
- Alumnus/alumna............................................................................... 18%
- Volunteer .......................................................................................... 10%
- Neighbor/community resident ..........................................................  7%
- Family/friend affiliated with charity ................................................... 5%
- Director/trustee .................................................................................. 4%
- Employee ............................................................................................ 3%
- Church/religion ................................................................................... 2%

From NCPG, Planned Giving in the United States 2004
IV. Developing Your Marketing Plan

How will you educate and approach each target group? Who is the right person to solicit, sign letters, or pitch at an event, and what is the right approach for each group?

**Personal, One-on-One Conversations**
- Your closest donors/families
- Key volunteer leaders—to provide leadership and testimonial support
- Consistent donors/families

**Group Presentations**
- Board of Directors
- Past Presidents or Board Members
- Auxiliary groups (e.g. sisterhood)
- A special “Donor Club”
- Consistent families/donors

**Special Mailings**
- Past Presidents or Board members
- A special “Donor Club”
- Consistent donor/families

**Incorporation into Agency/Synagogue/Day School Materials**
- In all newsletters
- On your general envelopes and stationery
- Website
- Events (tent cards on tables, message in speeches, etc.)

Create opportunities for bequest donors to identify themselves.
- Legacy societies motivate some donors to disclose. (See Recognition and Stewardship, Section VI.) Advertise to all donors that you’ve established a legacy society and are participating in the Foundation’s Legacy Society.
- Tell all your constituencies that you want to know if they have made a bequest so you can recognize them during their lifetimes.
- Craft messages in materials to let all your members and donors know about your Leave a Jewish Legacy goals and why it is important for them to notify you of their future gift today.
- Build trust. Reinforce in all personal visits and print materials that you embrace Leave a Jewish Legacy’s donor-centered values and honor donor confidentiality.
- List a named person (staff or volunteer) and direct phone number to contact about bequests in all print materials.

What vehicles/tools might you need to communicate your case?
- Website. Be sure to link your site to the Foundation’s Leave a Jewish Legacy program at www.jcfhartford.org.
- PowerPoint presentation
- Newsletter
- Volunteer training materials
- Reply cards, donation envelopes, sample bequest forms
- Personal mailings
**Important Facts for Developing a Marketing Plan**

67% of bequest donors have not informed the charity of their bequest. Primary reasons for not informing the charity are:

- Did not want attention: 53%
- Concern about privacy: 15%
- Do not want to be asked for other gifts: 13%
- May change mind/charities: 5%
- Not important/does not make a difference: 4%

Provide written material about charitable bequests. 34% of bequest givers say they first learned about the idea of charitable bequests from materials published by a charity.

Remember that people influence people. People are next in line after published materials as a source of the idea of a charitable bequest. 21% say they first learned about bequests from legal or financial advisors and 20% said the idea came from family or friends. 11% said the idea came from a personal visit from a representative of a charity.

Ask! 87% of supporters (donors who have not yet made a bequest) indicated that they believe it is appropriate for nonprofits to ask for a legacy gift. 92% of bequest pledgers who have made a bequest believed it is appropriate for nonprofits to ask.

From NCPG, *Planned Giving in the United States 2004*
V. Recognition

Develop and implement acknowledgment procedures.

*Thank the donor immediately.*

- As you receive knowledge of a gift, consider a personal call from the President of your Board, other appropriate Board members, and/or the Rabbi/Executive Director.
- Send a thank-you letter within 48 hours. Include permission to publish the donor’s name(s) and ask how to list the name(s) properly.
- Send a personal thank-you note from the Rabbi/Executive Director and the President of the Board.
- Have the younger generation who are served by your organization make thank-you notes or gifts (if the gift is not confidential or anonymous).

*Utilize the Foundation’s Legacy Society and define your own “society.”*

*Name it.* This is your special group of caring and forward-thinking families who have preserved the values that they hold dear about your organization with a bequest. Honor this group with a name that communicates their significance.

*Plan special society gatherings.* You can use your society to bring together these special families, with receptions or educational forums. This can include inclusion in certain VIP events, educational events, seminars about changes in tax laws or other estate planning topics, and for special “insider updates” on your organization’s current—and future—funding needs.

*How will you recognize members of your “society,” and what is your timeline?*

1. *Jewish Community Foundation’s “Welcome Program.”* JCF will send a thank-you letter to each legacy donor and include information about the *Voices of Philanthropy—Hartford Jewish Legacies* project.

2. *Your agency’s or synagogue’s acknowledgment of the bequest.* This could include a thank-you letter, a Society memento or a small gift (a pin, a plaque, etc.), and induction into your legacy society. Be sure to obtain their permission and respect confidentiality.

3. *An annual recognition event.*

4. *List society members in your organization’s promotional materials*—for instance, in your annual report, newsletters, etc.

5. *Write newsletter articles* that feature donor families and why they have chosen to give.
**Important Facts about Donor Recognition**

*What makes a superior thank-you letter? Here’s what donors say:*

- 51% say “personalized in some way”
- 30% say “the letter acknowledges how the gift will be used”
- 16% say “handwritten”
- 13% say “signed by a member of the Board”

*Don’t overstep.* 66% of individual donors say they have received requests for another gift within the body of a thank-you letter. 53% say that this is rude, and an additional 8% stop giving if this happens.

*Prompt gift acknowledgment* influences 44% of donors’ future giving decisions.

From *Donor-Centered Fundraising* by Penelope Burk
VI. Stewardship

What is your stewardship plan for legacy donors?

• How will you maintain contact with society members, so that they stay engaged and feel rewarded?

How will you build a relationship with your bequest donors?

• Develop a strategy and tactics to provide a high level of service and courteous communications to your new bequest donors. Studies show that bequest donors should be developed with a differentiated standard of care as they appear to be more demanding in respect to the quality of service received.

• Keep them informed about how you are making an impact and fulfilling the mission of your organization.

• Use your bequest plan development process as a cultivation/conversation opportunity or as a stewardship opportunity.

• With those individuals/families who have already made a bequest or some form of endowment gift, you can share the plan with them, inviting their feedback and suggestions on how to make the program an overwhelming success.

• With some families you are cultivating, you can share your initial plans, and also invite their suggestions and feedback. This could be valuable when meeting with your past Presidents as a group, or with families one-on-one.

**Important Facts about Stewardship**

• Bequest pledgers are significantly more demanding than other donors in every area of communication with a charity—including acknowledgment, courtesy, information, and responsiveness.

• Bequest pledgers want to receive feedback on how their money is being used.

• Bequest pledgers place a high level of importance on performance and professional reputation.

• Pledgers are more likely to agree that they look for nonprofits that spend a high proportion of their income on the cause.

*From Determinants of U.S. Donor Behavior: The Case of Bequests*
VIII. Setting Goals

*Make your goals realistic—and achievable.* Start by determining your basic organizational goals, then set goals for each target group and category (such as the number of family contacts you will make, how many one-on-ones, how many group presentations, etc.).

**What Are Your Organization’s Goals?**

**Year 1**  
Number of Solicitations: ____________________  
Number of Bequests: ____________________

**Year 2**  
Number of Solicitations: ____________________  
Number of Bequests: ____________________

**Year 3**  
Number of Solicitations: ____________________  
Number of Bequests: ____________________

You may have higher goals because of early board member participation and momentum during the first year, followed by fewer bequests in subsequent years.

If you haven’t been great at donor stewardship in the past, you may have to mend some fences before you can achieve solid results. In these cases, your goals for the first year may need to be more conservative.
Sample Case Statement and Bequest Plan
for the San Diego Jewish Academy
Legacy Campaign

Introduction

San Diego Jewish Academy (SDJA) is one of the country’s premier Jewish day schools, and the largest, most prestigious day school in the community. It challenges its students to achieve their full academic potential and become individuals of strong moral and ethical character, while inspiring them to make Judaism a vital and relevant aspect of their lives.

SDJA provides an education beyond academics. Every student is given the opportunity to participate and/or lead in Jewish campus life, sports, performing arts and school government. Low student/teacher ratios and individual attention from teachers maximize student success. SDJA educates the “whole child” by focusing on Jewish values. In doing so, the school builds future leaders who are respectful, thoughtful and caring.

SDJA began as a neighborhood school on the property of Congregation Tifereth Israel in San Carlos in 1979. As the Jewish population of San Diego and the enrollment began to increase and relocate further northwest, a second campus was added at Congregation Beth El in La Jolla in 1983. Long after outgrowing its rented facilities at Congregation Beth El, and spurred by major gifts from two families, SDJA’s Board of Trustees embarked on a capital campaign in 1998 to build a spectacular 40-acre campus in Carmel Valley, complete with five academic buildings, a learning center, and athletic fields. The new campus opened in September 2000, with capacity for over 1,000 students, a high school (grades 9-12), extracurricular sports teams, advanced placement courses, a performing arts program, and state-of-the-art science facilities. This year SDJA is proud to be celebrating its 25th Anniversary and looks to a future that is bright and financially secure.

Promise

Through your generous gift or bequest to the SDJA Legacy Campaign you ensure the future of San Diego Jewish Academy, an outstanding educational institution that benefits our children and the entire Jewish community of San Diego.
Purpose

Creating an Endowment or leaving a Bequest or Planned Gift to the SDJA ensures that the school will continue to:

- challenge students to achieve their highest academic potential and become individuals of strong moral and ethical character
- educate Jewish children, who help to carry the teachings and values of our Jewish heritage forward to a time we will not see.
- inspire children to make Judaism a vital and relevant aspect of their lives
- provide an education beyond academics, including intramural sports, fine arts and performing arts
- attract new Jewish families to the community who require a quality Jewish day school
- provide a center of Jewish learning where parents, grandparents, and the general community expand their Jewish knowledge
- ensure Jewish continuity through one of the most effective and proven means of instilling strong Jewish identity in young people

For information about creating or participating in an endowment fund or leaving a bequest or planned gift to the San Diego Jewish Academy, please contact Meg Goldstein at (858) 704-3706 or via e-mail mgoldstein@sdja.com.

Goals

Within the next 5 years, the Academy intends to have raised $10 million in endowment funds. Our Legacy Campaign was really launched by the generosity of the Chortek family’s million dollar Endowment. In addition to the Chortek gift we have endowment gifts from eight other donors representing $196,000.

To ensure our goals are met, the following schedule of activities will be undertaken on an ongoing basis:

- 1 school wide mailing to disseminate the JCF “Create a Jewish Legacy” brochure and/or raise awareness of our Legacy Campaign.
- 1 letter appeal in conjunction with Grandparents Day, with the aim to realize 12 bequests per year and prospects to attend parlor meetings or receive personal stewardship/solicitation
- 2 group presentations (excluding Board presentations) per year also with the aim of realizing 12 planned gifts/bequests per year (as stated above)
- 4 prospect personal/solicitation visits per month with the aim of realizing 10 outright endowment gifts per year
Over the course of three years, we hope to realize the following cumulative results:

Year 1: 10 Outright Endowments (currently at 9) 2 Bequests (realized)
Year 2: 20 Outright Endowments 14 Bequests
Year 3: 30 Outright Endowments 26 Bequests

Legacy Circle

The Legacy Circle represents those donors whose generosity and foresight will ensure that the San Diego Jewish Academy will always flourish and grow - teaching, nurturing and inspiring the next generation of Jewish leaders. The Legacy Circle recognizes those loyal and committed SDJA donors who create or participate in an outright endowment for the school or who designate a charitable gift through a bequest or planned gift to the school.

Targeted Donors

The Academy is blessed with both visionary and committed leadership and a base of loyal donors. The groups specifically targeted for inclusion in the Legacy Circle will be:

Board of Directors
Past Presidents
Past Board Members
Current Grandparents
Past Parents
Prior Donors to the SDJA Capital Campaign
Staff

Distinct approaches will be employed to reach members of these groups. In the case of high potential outright endowments (those projected to realize gifts of $100,000 and above) a personal relationship and ask will be entered upon by the school’s most seasoned leadership and solicitors. A formalized process of Stewardship (see attached) for, past leaders, prior mega donors and prospective high potential donors has been adopted to support this effort.

In order to raise consciousness and acquire midrange outright endowment gifts or bequests a series of parlor meetings will occur during the spring. In the case of the broader base letter campaigns will be undertaken on an annual basis.

Marketing

- Video of the Case for Giving
- Brochure of the Case for Giving
- SDJA Website
- Link to the JCF Leave a Jewish Legacy Website
- Legacy Circle Annual Newsletter
Recognition and Stewardship

- A thank you/welcome letter is mailed immediately upon a donor agreement to make an endowment gift or leave a bequest or planned gift to the SDJA.
- Names of all Legacy Circle Members (who have given permission) will be recorded on appropriate Endowment signage, per the Board adopted Endowment Policies and Procedures. Existing donors and all those who make gifts/bequests within the next 3 years (prior to August 31, 2007) will be considered Charter Members.
- An informational newsletter will be sent to all Legacy Circle donors, prospects and SDJA Board members. This annual newsletter will have timely planned giving information as well as a listing of all current members of the Society.
- A recognition reception is planned for Spring 2005 to recognize all Founding and Charter Members of the Legacy Circle. Each year members will be honored at an appropriate event. In instances where a donor’s endowment creates sufficient annual revenue to be included in the recognition events honoring annual giving they will be included in these prestigious giving circles as well and awarded all attendant benefits.
- A Legacy Circle Commemorative Book/Board is being considered to record the personal stories, intent and testimonials of members. All members will be encouraged to sign the Book of Life at the Community Foundation.

Education

Over the course of the past 4 months, Howard and Marsha Berkson have convened a series of Financial Resource Development Task Force Meetings to build consensus around the school’s message to donors and its need for ongoing fundraising. Serving on the task force were the school’s philanthropic leaders, both from the Capital and Annual Campaign, representation from the Board, including the current, past and incoming Presidents, Parents and Alumni. Integrating a Legacy Campaign into our ongoing fundraising efforts was viewed as critical and will be widely supported by these key leaders. Additionally at its initial Board Retreat for the year the SDJA Board has adopted a set of policies and procedures that will guide and govern this endeavor. The Task Force understands the wonderful opportunity provided SDJA by its participation in the Endowment Leadership Institute and the community wide “Create a Jewish Legacy” initiative sponsored by the Jewish Community Foundation.
Management

All the elements of the Legacy Campaign will be managed and coordinated by Meg Goldstein, Director of Development, in conjunction with a Financial Resource Development Steering Committee currently comprised of:

Renee Sherman, SDJA President and Stewardship Committee Chair
Larry Acheatel, SDJA Executive Director
Deena Libman, SDJA Annual Campaign Coordinator
Janet Clancy, SDJA Marketing Director
Bev Pamensky, “Create a Jewish Legacy” Chair
Howard Berkson, Major Gifts Endowment Co-Chair
Marsha Berkson, Major Gifts Endowment Co-Chair
Carlos Michan – Latin Community Chair
Jeanne Zlotnick, Annual Campaign Co-Chair
Leo Spiegel, SDJA President Elect and Capital Campaign Chair

*Peter and Elaine Chortek have agreed to serve as Honorary Endowment Chairs.

All records and gifts will be entered into Raiser’s Edge and kept strictly confidential. High potential donor histories and interactions will also be tracked in Raiser’s Edge. Management and investment of Endowment Funds will be handled by the Jewish Community Foundation under the advisement of the SDJA Finance Committee.
Voices of Philanthropy—Hartford Jewish Legacies

Voices of Philanthropy is a new and exciting project to capture the personal stories behind the hundreds of legacy gifts made by generous Jewish families in Greater Hartford. Our donors have important stories to share about their lives in Hartford and why they are leaving a legacy for the future.

Any person who has made a promise to leave a legacy for the Jewish community or a local Jewish agency or organization may participate in the Voices of Philanthropy project. Individuals will be asked to leave a personal message to future generations, briefly telling their family story and expressing their thoughts about tzedakah. Many donors will share personal memories of Jewish life in Hartford and significant life cycle events. Each story will be accompanied by a family photograph.

The legacy stories will be compiled and placed in a specially designed volume. Participants will receive a reproduction of their testimonial. The Voices of Philanthropy collection will be on permanent display in the lobby of the Harry and Jeanette Weinberg Community Services Building as an ever-growing record of names and family stories—a collective portrait of our Jewish community.

Some families may wish to have their testimonials videotaped or digitally recorded. The Jewish Historical Society of Greater Hartford offers a special package for families who want to take the next step of documenting an oral history interview or engaging a professional videographer to create a family history.
Hartford holds a special place in my heart. My late husband, Julius, and I spent most of our lives in the area. Julius felt closer to Hartford than to Florida, even after we moved.

I grew up in New Britain and attended New Britain High School. World War II took this hometown gal far from Hartford. I was an operating nurse in the army serving as First Lieutenant in Australia and the Philippines. I am an active member of the Association for Jewish Registered Nurses. After military service Julius and I were married in 1947 at my family temple, B’nai Israel. We moved first to Hartford, Charter Oak Place and later moved west to the suburbs and settled in on Ballard Drive. Julius was a hard working accountant at Mellon White in East Hartford while I was equally hard at work raising two sons, Stuart and Barry, and devoting my time to community service through Hadassah and other Jewish organizations.

Our family enjoyed winters in Florida and eventually settled in Boynton Beach. Julius passed away in 1999. I wanted to honor his memory in a lasting way, so I set up an endowment fund at the Foundation in his name that would be a permanent tribute to him and our life together. It is an unrestricted fund that supports a broad range of programming in the Jewish community and meets important emergency needs.

I am leaving a bequest through the Jewish Community Foundation to continue our commitment to the Hartford Jewish community. I want to make sure that the wonderful programs and organizations that helped shape my children’s lives will be here for future generations.  

Naomi Larman  
September 27, 2006
Voices of Philanthropy—Hartford Jewish Legacies
Donor History Form

Name:

Do you have a tradition of Jewish giving in your family?

How did you learn about tzedakah?

When did you start contributing to Jewish causes?

Describe your connection to Hartford.

What are some of the reasons that you are leaving a legacy for the Greater Hartford Jewish community?
What do you envision for the Greater Hartford Jewish community of the future?

What values and vision do you want to impart to future generations?

Please feel free to add other information you want to share about your connection to Hartford and your legacy.

________________________________________________________________________
Signature

________________________________________________________________________
Date
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.
Bequest Intention Form

If it is your intention to provide for the Jewish Community Foundation with a bequest or other future gift, we would like to include you in our Legacy Society and properly thank you and acknowledge your gift during your lifetime. Please complete this form and return it to the Foundation offices. This is a confidential record.

This Bequest Intention Form is not a legal document. It simply serves as a way for us to appreciate and recognize your generosity.

☐ I have already included the Jewish Community Foundation in my estate plan.

☐ I intend to include the Jewish Community Foundation in my estate plan.

If you are willing to provide us with the details of your plans, we thank you.

MY BEQUEST WILL BE:

☐ A PERCENTAGE OF MY ESTATE
☐ THE RESIDUE OF MY ESTATE
☐ LIFE INSURANCE
☐ A SPECIFIC DOLLAR AMOUNT
☐ A SPECIFIC ITEM OF VALUE
☐ RETIREMENT PLAN PROCEEDS

THE APPROXIMATE VALUE OF MY BEQUEST WILL BE: __________________________

☐ MY BEQUEST IS UNRESTRICTED

☐ IT IS MY INTENTION THAT MY BEQUEST BE USED FOR THE FOLLOWING PURPOSES: ___________________________________________________________

INFORMATION ABOUT YOU:

YOUR NAME: ___________________________________________ DATE OF BIRTH: ___________ __________

SPouse NAME: ________________________________________ DATE OF BIRTH: _______________________

MAILING ADDRESS: ____________________________________________________________

PHONE: (HOME) _______________________________ (WORK) _______________________________

EMAIL: ____________________________________________ FAX: ______________________________

Unless you indicate otherwise, a member of our staff will call you.

☐ I look forward to talking with you about this gift intention. I understand that listing this gift may be an incentive for others to give and I am willing to be publicly acknowledged.

☐ I understand you would like to contact me and I would be happy to discuss this with you, but I prefer not to be listed or acknowledged publicly.

☐ I understand you would like to contact me, but I prefer to remain anonymous and request no contact or acknowledgment.

SIGNATURE: ___________________________ Signature: ______________________________

DATE: ____________________________
Suggested Bequest Language

While your attorney is responsible for the legal aspects of your planning, we are pleased to provide the following information as a courtesy to prospective donors and their attorneys.

“I give to the Jewish Community Foundation of Greater Hartford, Inc., presently located in West Hartford, Connecticut, the sum of ______________ dollars ($______) [OR the residue and remainder of my estate] to be held in a separate charitable fund of the Foundation, to be known as the ‘_______________________ Fund.’ Net income from the Fund, determined in accordance with the Foundation’s spending policy in effect from time to time, shall be distributed annually to ________________________________, with a principal office presently located in ________________, Connecticut.”

We ask that you let us know your intentions to name the Jewish Community Foundation in your will so that we can invite you to join our Legacy Society. Simply call Deborah Rothstein, our Director of Development, or Doreen Fundiller-Zweig, our Executive Director, at 860.523.7460.
## Leave a Jewish Legacy

### Legacy Downs Scorecard

through March 2011

<table>
<thead>
<tr>
<th>Organization</th>
<th>Number of Legacies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jewish Community Foundation of Greater Hartford</td>
<td>168</td>
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<tr>
<td>Jewish Federation of Greater Hartford</td>
<td>34</td>
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<tr>
<td><strong>Agencies</strong></td>
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<tr>
<td>Federation Homes</td>
<td>5</td>
</tr>
<tr>
<td>Hebrew Health Care</td>
<td>15</td>
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<tr>
<td>Jewish Association for Community Living</td>
<td>8</td>
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<tr>
<td>Jewish Family Services of Greater Hartford</td>
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<tr>
<td>Jewish Historical Society of Greater Hartford</td>
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<tr>
<td>JFACT Fund</td>
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<tr>
<td>Mandell Jewish Community Center</td>
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<tr>
<td><strong>Schools</strong></td>
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<td>Hebrew High School of New England</td>
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<tr>
<td>Bess and Paul Sigel Hebrew Academy</td>
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<tr>
<td>Solomon Schechter Day School of Greater Hartford</td>
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<tr>
<td>Yachad Jewish Community High School</td>
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<tr>
<td><strong>Synagogues</strong></td>
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<td>Beth El Temple of West Hartford</td>
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<tr>
<td>Beth Hillel Synagogue of Bloomfield</td>
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<tr>
<td>Congregation Beth Israel, West Hartford</td>
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<td>Emanuel Synagogue, West Hartford</td>
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<td>Farmington Valley Jewish Congregation–Emek Shalom</td>
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<td>Temple Beth Hillel, South Windsor</td>
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<tr>
<td>Temple B'nai Abraham, Meriden</td>
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<tr>
<td>Temple Sinai, Newington</td>
<td>6</td>
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</tbody>
</table>

### Total Number of Legacies

433

### Total Realized Bequests in FY 2011

2,811,084

### Total Estimated Expectancies*

37,174,653

*Estimated expectancies are calculated by amount, if known, or the national bequest average of $50,000. The average bequest realized by the Jewish Community Foundation is $113,832.