



# CREATE A Jewish Legacy

**1.** In 2014, the Jewish Community Foundation of the Milwaukee Jewish Federation launched a transformational initiative, **CREATE A JEWISH LEGACY**. The initiative was designed to, and vastly successful in, helping to secure the future of 15 community partner organizations by strengthening their endowments through legacy giving. These legacy gifts came in the form of bequests, retirement assets and other planned gifts. For 2017 and beyond, the Foundation will continue to build on this success.

## 2. ACHIEVEMENTS IN LEGACY 2014-2017:

455 Donors  
 + 700 Legacy Commitments  
 + 15 Partner Organizations  
 = **\$18 Million in Future Gifts**

Incentive Grants of \$391,000 were awarded to partner organizations, thanks to the generous support from the Harold Grinspoon Foundation, Bader Philanthropies, CT Charitable Fund and Anonymous Funds of the Jewish Community Foundation.

## 3. FOUR PILLARS OF LEGACY

### Secured the Future

Trained partner organization leaders in the importance of legacy gifts and how to ask for these gifts.

### Strengthened the Community

Fostered collaboration among partners to share successes and learn from each other.

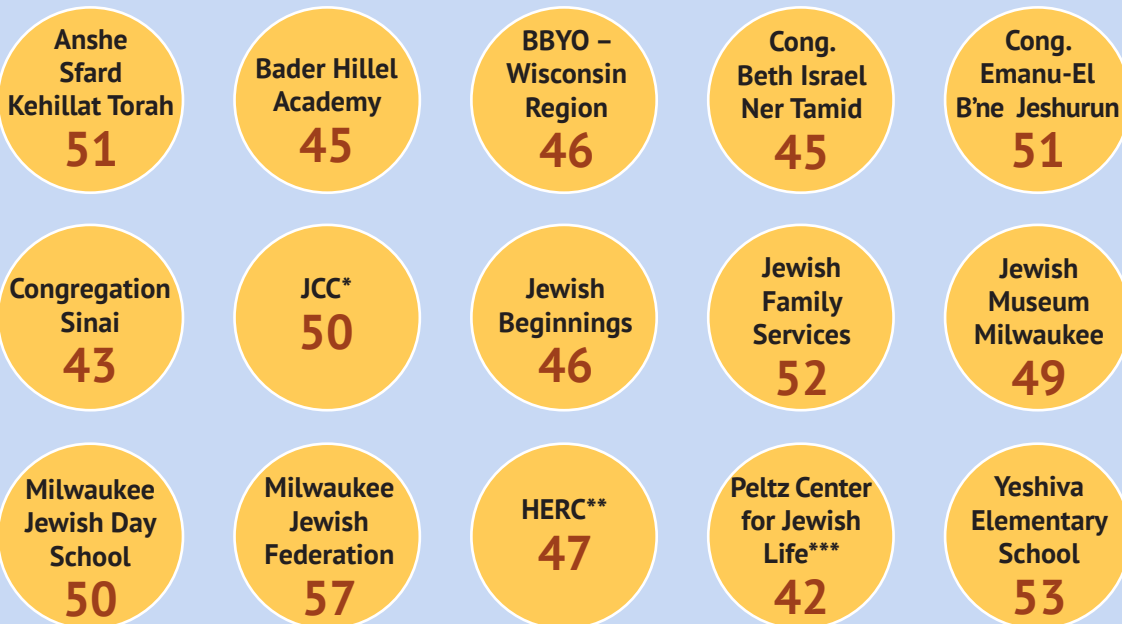
### Advanced Legacy Giving

Facilitated the integration of legacy giving and stewardship activity into the culture of the organization.

### Maximized Impact

Created opportunities and resources to help our partners connect with donors in deeper and more meaningful ways.

## 4. INDIVIDUAL PARTNERS' LEGACY THREE YEAR COMMITMENTS



\*Harry & Rose Samson Family Jewish Community Center

\*\*Nathan & Esther Pelz Holocaust Education Resource Center

\*\*\*Joseph and Rebecca Peltz Center for Jewish Life

Greg Marcus, *JCF Chair*  
 Caren B. Goldberg, *Chief Development  
 Officer & JCF Executive Director*

Jody Kaufman Loewenstein,  
*Program Chair*  
 Jane Chernof, *Program Coordinator*



Jewish Community  
 Foundation  
**MILWAUKEE**  
 JEWISH FEDERATION