

# Do You Know ...

By Phil Warshauer, Executive Director, Foundation for the Charlotte Jewish Community

The period between Thanksgiving and New Years is often a great time to catch up on my reading. Call it a pre-New Years resolution. Each year I tackle that pile of clippings, magazines and interesting articles that I've cast aside to be read.

Among my findings was a 2009 study by the Stelter Company given to me by a member of our Jewish community. Between July 19 and July 22, 2009 Stelter inter-

viewed 800 adults aged 30 and older about charitable giving to nonprofits. They wanted to know three things: how had the economy altered their giving? What was their awareness of the term "planned giving"? And, how acceptant are potential heirs of charitable giving?

The study confirmed that the past year has been a difficult one for nonprofits and their donors. It also acknowledged that while many are familiar with planned giving, there is room for a little education to help people under-

stand the many options they have to give. We've attempted to do this in our Jewish community and will continue to do so. It was the third area that really grabbed my attention.

Do you know that Planned Giving is often the most efficient and effective way to make a charitable gift? A planned gift can be a gift of cash, securities, property or any other tangible item that has a dollar value. A planned gift is not defined by an amount but rather the method used to make a charitable gift. Planned gifts can be made now, later in your lifetime or deferred until after your death. A planned gift can provide income to you and your spouse during your lifetime and help to reduce taxes.

Do you know that most people never consider making a planned gift because they are never asked to do so? Let this be my personal invitation to you. If you would like information about planned giving please give me a call at 704-973-4544 or send me an email at pwarshauer@charlotte-jewishfoundation.org. A little information goes a long way.

Do you know that 84% of those

interviewed between the ages of 30 and 39 have never been approached about making a planned gift? Not so surprising, but what interested me was that almost 60 percent of those interviewed in that same age group say they probably would or might leverage at least one of the six gift vehicles mentioned in the study. Wow, even more reason to give me a call me at 704-973-4544 or e-mail at pwarshauer@charlotte-jewishfoundation.org.

Do you know that 40% of respondents ages 40 to 49 say the main reason they have not already made a planned gift is that they just haven't thought about it before? Well, what better time than the present to start thinking about it. The study seems to indicate that this age group is often overlooked in the planned giving conversation. When asked, more than 57% indicate they might consider a planned gift. In fact, more than 83% say that they think a 5-10% planned gift is reasonable in an estate in which they are named as heirs. My kind of people! They are interested in not only making a gift themselves but also forgoing a percentage of what is left to them



from others. We need to get them to talk to their elders.

Do you know that more than 93% of respondents over the age of 60 say a major reason they have not and likely will not include a nonprofit in their plans is because they prefer to leave their assets to friends and family? Now I'm confused. More than 72% of heirs (those expecting to receive an inheritance and regardless of age) responded that they think it is reasonable for that plan to designate five to ten percent to charitable organizations. The largest response was from those identified in the middle income bracket with household income between \$50,000 and \$100,000. Perhaps a little communication is in order.

If you're still in need of additional information you can always contact me at 704-973-4544 or email at pwarshauer@charlotte-jewishfoundation.org. Happy New Year! ☆

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## 2010 JCC Maccabi Games Informational Meeting Set

There will be an informational meeting for those families interested in learning about the 2010 JCC Maccabi Games on Thursday, January 14 at 7 PM in Gorelick Hall at the Levine JCC.

Our delegation from Charlotte will be attending the JCC Maccabi Games in Richmond, VA next summer with 30 nationally allotted spots. The dates are August 1-6, 2010. Approximately 1300 Jewish teens from 35 different United States /Canadian cities and three foreign countries (Australia, Israel

and Venezuela) are expected to attend the Richmond Games.

The JCC Maccabi Games are for Jewish teens between the ages of 13-16 years (birthdates of July 31 as deadline dates), with priority registration given to current Levine JCC members. The Games comprise the largest gathering of Jewish teens worldwide when combined with the numerous Host Cities (there are four Host cities for 2010 with expected total participation numbers to be in the 4500 range).

Various sports being offered in Richmond include: Baseball, Basketball, 7 v. 7 Soccer, Bowling, Swimming, Table Tennis and Tennis. Depending on interest levels, tryouts may need to occur to fill the designated team sport allotments.

For further information about the JCC Maccabi Games, please contact Barry Schumer, Levine JCC Assistant Executive Director, at 704-944-6744. ☆

## JCC Tributes

### LJCC Program Endowment Fund

In memory of Harry Meyers, father of Eugene Meyers from Renee and Steve Rosenau, Ann and Robert Tuteur

### Menaker Family Endowment Fund of Jewish Programs

In honor of Scott Menaker's birthday and Steven Menaker's birthday from Cary Bernstein and Alan Kronovet

### Mindy Ellen Levine Day Camp Endowment Fund

Wishing Lori and Eric Sklut a happy Chanukah from Julie and Howard Levine

### Musler Memorial Fund for Children's Programming

Wishing Sol Levine a happy birthday from Margi Goldstein

### Paul Spil Memorial Softball Endowment Fund

In memory of Frank Rosen's mother and in memory of Marcia Stern's mother from Linda and Morris Spil

### Stuart Ostrow Memorial Fund

In honor of the marriage of Steven and Lisa Ostrow from Lynn and Paul Edelstein ☆

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