

Leaving a Legacy of Our Own

By Brett Goodman

I've never thought of myself as someone who could establish a legacy gift. To me, legacy gifts are established by individuals and families with recognizable names and enormous amounts of wealth. They make gifts to charities and universities that have buildings bearing their family name. I do not fit into that category.

I grew up in Charlotte and have seen our Jewish community grow in ways that no one could have ever imagined. My family has always been supportive of our Jewish community and my parents taught me that I had that same responsibility. So, over the years and to the best of our ability, Leigh Anne and I have contributed to our favorite Jewish organizations. Our commitment as volunteers helps to bridge the gap between the charitable gifts we wish we could make and those that our budget would allow. Many years ago I was inspired to become involved with Jewish Family Services (JFS) because of their mission to serve the most vulnerable members of our community.

I also served on the board of the Foundation for the Charlotte Jewish Community (FCJC), as a representative of JFS. During that time I attended board meetings, breakfast meetings and other community events, and listened to Phil Warshauer as he explained the many different ways that each of us can make a legacy gift to support our favorite Jewish organization. For those unfamiliar with Phil, he serves our community as the executive director of the

Foundation for the Charlotte Jewish Community. His role is to assist our Jewish organizations and all of us on an individual basis with long-term philanthropy. I learned about the Book of Life Society and how it serves our community in recognizing those individuals and families who have made such gifts. While I supported the Book of Life project as an FCJC and JFS Board member, I never thought it applied to me.

I can remember the moment that the "light went off in my head" and I began thinking a bit differently about the Book of Life and our ability to create our own legacy. It happened at a morning breakfast meeting discussing endowments with members of the Jewish Family Services board. There had been many similar planning meetings of this nature as we discussed how to build endowments to support the future needs of Jewish Family Services and the members of our community who are so dependent on the services that JFS provides. But this time, for the first time, I realized there were more ways to make legacy gifts than I had imagined, ways that Leigh Anne and I could make an additional gift without impacting our lifestyle or budget. In fact, gifts of this nature do not even require a gift of any current assets, cash or stock. All it takes is a promise. In our case this promise comes in the form of a life insurance beneficiary form. I could have just as easily used a beneficiary form for an IRA or Corporate Retirement plan. And it was easy. I contacted my life insurance

agent, who sent me a form, I signed it and it was done.

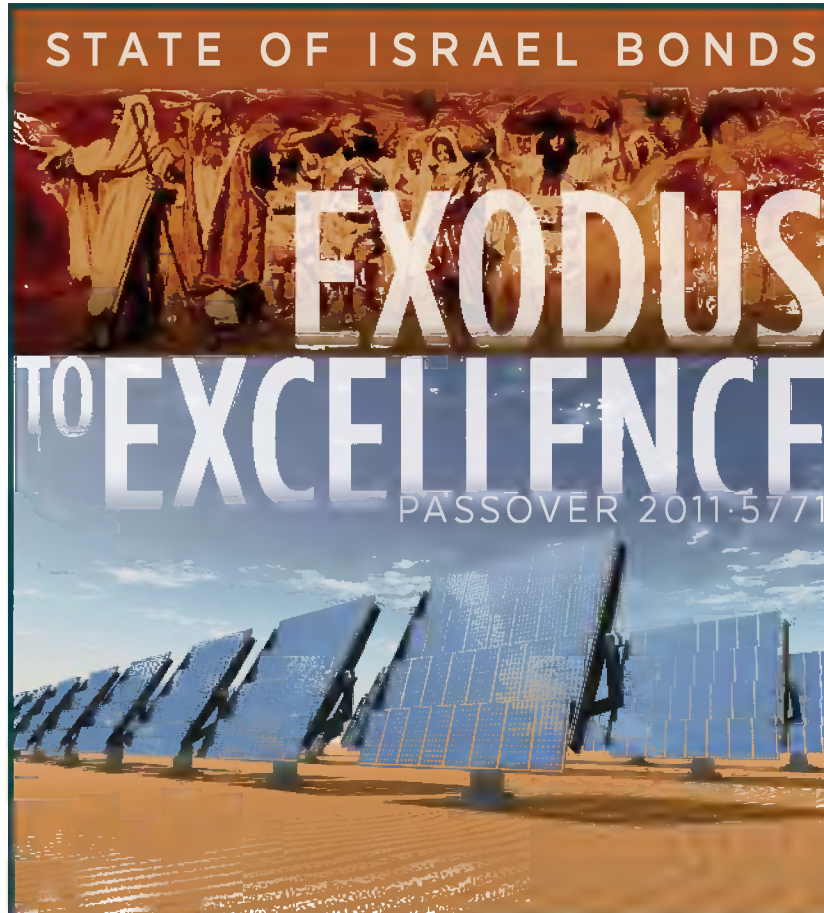
I now understand that we all have the ability and financial resources to leave a legacy of our own. You do, too. It is easy and does not require enormous wealth but rather an interest in making our community, our world a better place. As I look at the current members of the Book of Life

Society I see many familiar names, but it is the names that are missing that impact me more. Each one of you has the ability to make a difference and leave your own legacy.

I am proud to say that Leigh Anne and I have made a commitment to support the future of our Jewish community with our legacy gift. We invite you to join us.



For additional assistance in creating your own lasting legacy please contact Phil Warshauer, Executive Director, Foundation for the Charlotte Jewish Community at 704-973-4544 or pwarshauer@charlottejewish-foundation.org. ✪



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Levine Cancer Institute Groundbreaking Ceremony



Sandra and Leon Levine (3rd and 4th from left) ceremoniously break ground for construction on the new Levine Cancer Institute of Carolinas Healthcare Systems.



Jill and Ed Newman, Lynn Edelstein, and Larry and Dale Polsky attended the groundbreaking ceremonies at the new institute's site.



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