

Community News

Nine Jewish Agencies and FCJC to Launch Create Your Jewish Legacy

By Jeffrey Bierer, Board Chair of Foundation for the Charlotte Jewish Community

According to the experts, the largest intergenerational wealth transfer in history has begun. The Social Welfare Research Institute at Boston College concluded that \$41 trillion will be transferred over the next five decades with at least \$6 trillion going to charity. So it is no surprise that our temples and other Jewish agencies want to make plans to participate in this transfer of wealth.

Foundation for the Charlotte Jewish Community (FCJC) received feedback and guidance from donors, staff, and lay leaders from the temples and Jewish agencies during the Strategic Planning process it undertook in 2011. There was virtual community unanimity that FCJC was expected to lead the effort, insuring that our Jewish institutions take proper steps to benefit from this enormous transfer of wealth.

FCJC is prepared to take up this challenge. In close cooperation with nine Jewish agencies, it is preparing to launch the Create Your Jewish Legacy initiative. This is not an annual campaign, it is not a capital campaign, and it is not even fund raising. The Create Your Jewish Legacy initiative will ultimately result in personal conversations with each of us in which we are asked "What is the legacy we want to leave?"

Each of us supports institutions and causes we believe in. Each of us, at the moment of our death, has the ability to leave the largest gifts we've ever made. The Create Your Jewish Legacy initiative is an opportunity to begin thinking now about what is most important to us and how we want to be remembered when we leave this life.

The Create Your Jewish Legacy initiative is funded for three years. Part of the funding came as a

result of our successful effort at winning a matching grant offered by the Jewish Federations of North America. Measured against 13 communities vying for the grant, we are one of only four organizations to receive this award. The JFNA grant is for \$30,000 a year for three years matched by equal funds raised in personal contributions by the generous members of our Jewish community. I am extremely proud to say that the donors include the entire FCJC Board. With these funds FCJC will bring in national speakers to train lay and staff professionals from the nine participating agencies. We will create a community wide marketing campaign to support our Jewish agency partners as they begin the personal conversations with each of us about what legacies we want to leave.

Until getting involved with

spitting three times now to dispel any bad luck!) while a percentage would go to Jewish causes important to our family. I can specify in my will where and to what program our money will go. And so can you. Whatever you dream of as your legacy it can be achieved, whether it is to provide scholarships in support of Jewish education, Birthright trips to Israel or preservation of our Torahs.

The first phase of the Create Your Jewish Legacy effort will begin by the end of the year. Join us to discuss what legacy you and your family want to leave and how you can fit it into your family's financial plan.

For more information about Foundation for the Charlotte Jewish Community and Create Your Jewish Legacy please contact Phil Warshauer at pwarshauer@fftc.org or 704-973-4544. ☆

Participating Jewish Agencies

Charlotte Jewish Day School

Hebrew Cemetery Association

Levine Jewish Community Center

Charlotte Jewish Preschool

Jewish Family Services

Temple Beth El

Congregation Ohr Hatorah

Jewish Federation of Greater Charlotte

Temple Israel

FCJC, I thought that leaving a legacy or bequest was for the wealthy and not something for a regular family like mine. I was surprised to learn how sensibly we could do something now. The first thing we did was to add a beneficiary on my life insurance policy. My family will be well taken care of if lightning strikes me (I'm



Donations to Jewish Family Services

(Continued from previous page)

Linda Lesak from Marvin Barman

Mark Farbman from Marcelle Peck

Myron Slutsky from Celia Mandel

Sue and Jerry Fine from Judie and Michael Van Glish

Thelma Wand from Lillian and Irving Bienstock

IN MEMORY OF

Ed Goldberg to Ellen Goldberg from Karen and Jeff Turk

Goldie Weinreb to Ben Weinreb, Gary Weinreb, Deborah Posner, and family from Jane Tigler, Evelyn Berger, Sissy and

Joel Butler

Janine Rosner to Ellis Levinson, Linda Spector, David and Mark Goldenberg, and Stuart Rosner from Henry Hirschmann

Marlene Rosenbaum to Gail Baron from Karen and Jeff Turk, Lynn and Paul Edelstein, Sally and Manny Rosenfield

Richard Fine to Amy Liesman from Ellen and Steven Engelhardt

Rita Mond to Darren Mond, Jered Mond, and Jodi Michel from Frances and Ronald Liss, Sandra and Leon Levine, Paula and Jules Epstein, Henry Hirschmann, The Club Car, Karen and Jeff Turk

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