

2021 Keynote and Workshop Descriptions

As of 2.4.2021 – *Subject to change*

All times Eastern Time

Tuesday, May 25, 2021

11:30 AM – 12:30 PM

2021 LIFE & LEGACY®/Create a Jewish Legacy Leadership Gathering Opening Ceremony

Arlene D. Schiff, Winnie Sandler Grinspoon, Harold Grinspoon, Dirk Bird, David Brown, Tammy Dollin, Jamie Light, Dr. Bruce Powell

Join us as we kickoff the 2021 LIFE & LEGACY®/Create a Jewish Legacy Leadership Gathering. We will celebrate our success to date, hear from the HGF President, Winnie Sandler Grinspoon, and the HGF Founder, Harold Grinspoon, set an intention for our time together over the next three days, and learn why endowment building is a moral imperative.

1:30 – 2:30 PM

Focus Groups by organizational type

(information coming soon!)

3:30 – 4:30 PM

Focus Groups by organizational type

(information coming soon!)

5:30 – 6:30 PM

Baby Boomers and Planned Giving: A Very Special Generation or Just Typical Old People

Dr. Russell James, Professor and CH Foundation Chair of Personal Financial Planning, Texas Tech University

In this irreverent and entertaining session, Dr. James reviews nationally representative data on Baby Boomers and their legacy giving. Beyond simple statistics, this workshop demonstrates how these demographic realities, and age-related psychological factors, should change how and when you communicate legacy giving information to Boomers. If you are seeking legacy-specific information on this target audience, based on hard data that goes beyond “just so” stories with obligatory pictures of Woodstock, Vietnam, and Neil Armstrong, then this is the workshop for you!

7:30 – 8:30 PM

North American Legacy Donor Appreciation Event

(information coming soon!)

Wednesday, May 26, 2021

11:30 AM – 12:30 PM

Why Now is the Perfect Time to Have Conversations About Values, Giving and Your Family's Legacy

Nanette Fridman, Founder & President, Fridman Strategies, Inc.

This workshop will explore how we pass our values and philanthropic spirit from generation to generation, share exercises for exploration about values and causes, and ideas to catalyze conversations with family members and heirs. Leave with next steps that are perfect for this moment in time.

1:30 – 2:30 PM

LIFE & LEGACY® Each One Reach One Campaign – Creating a Movement

Lynne Wester, The Donor Guru, Donor Relations Guru, LLC

This workshop will walk you through LIFE & LEGACY's new campaign to help you double the number of legacy donors in your organization and community. In this interactive session, you will learn how to build out your *Each One Reach One* initiative. Hear about the tools LIFE & LEGACY has created for you to use in your efforts, and how to recruit donors and volunteers to move your legacy initiative forward.

3:30 – 4:30 PM

Using Presence and Communication to Secure Legacy Commitments

Rae Ringel, Certified Executive Coach and founding President of The Ringel Group

Presence and communication during both in-person and virtual conversations, are fundamental to achieving excellence because language is generative – it creates new dynamics in every relationship. In this workshop, we will focus on critical in-person and virtual communication skills that improve your ability to achieve results. From asking powerful questions, to deep intensive listening, to asking others to join you in making a legacy commitment, and breaking unproductive habits, you will learn critical skills that will lead to more productive legacy conversations.

5:30 – 6:30 PM

Change the Story, Change the World

Andy Goodman, Co-Founder and Director of The Goodman Group

Since we first began talking to each other, telling stories has been a powerful way to capture attention, engage an audience, and motivate to action. As we learn more about how our minds work, we are also discovering that stories are intrinsic to decision-making and shaping our view of the world. In his workshop, Andy Goodman will explain why storytelling remains the single most powerful communication tool you possess. He will offer specific ways your organization can use stories to advance your legacy initiative.

Thursday, May 27, 2021

11:30 AM – 12:30 PM

Making the Ask!

Nanette Fridman, Founder & President, Fridman Strategies, Inc.

In this interactive workshop, we will define and explore motivations for legacy giving. Together, we will outline the steps for making the ask and discuss the key elements of a legacy conversation. Whether you are new to having legacy conversations, or have been having them for a while, join us! This is an opportunity to both learn new and enhance existing legacy conversation skills.

1:30 – 2:30 PM

Continuing Your LIFE & LEGACY® Each One Reach One Journey – Building and Advancing the Movement

Lynne Wester, The Donor Guru, Donor Relations Guru, LLC

In this workshop, we will discuss advanced strategies and tactics to take your legacy initiative to the next level. We will combine storytelling and the WHY behind our efforts to help you double your organization/community's legacy donors through our new *Each One Reach One* campaign. We will also explore the psychology behind why it is not the leader that takes a movement to the next level, it is the first brave follower.

3:30 – 4:30 PM

Sharing Your Story

Boris Fishman, Author, Journalist and Creative Writing Professor

(information coming soon!)

5:30 – 6:30 PM

Formalizing Legacy Commitments – A Panel Discussion

(information coming soon!)

7:30 – 8:30 PM

LIFE & LEGACY Graduation, Gail Littman Award and Closing Ceremony

Please join us as we honor the newest communities to complete the four-year LIFE & LEGACY® curriculum! We will also announce and honor the 2021 Gail Littman Award winner, and bring to conclusion three days of networking, sharing successes, brainstorming around challenges, and preparing to double the number of legacy donors by December 31, 2021.