

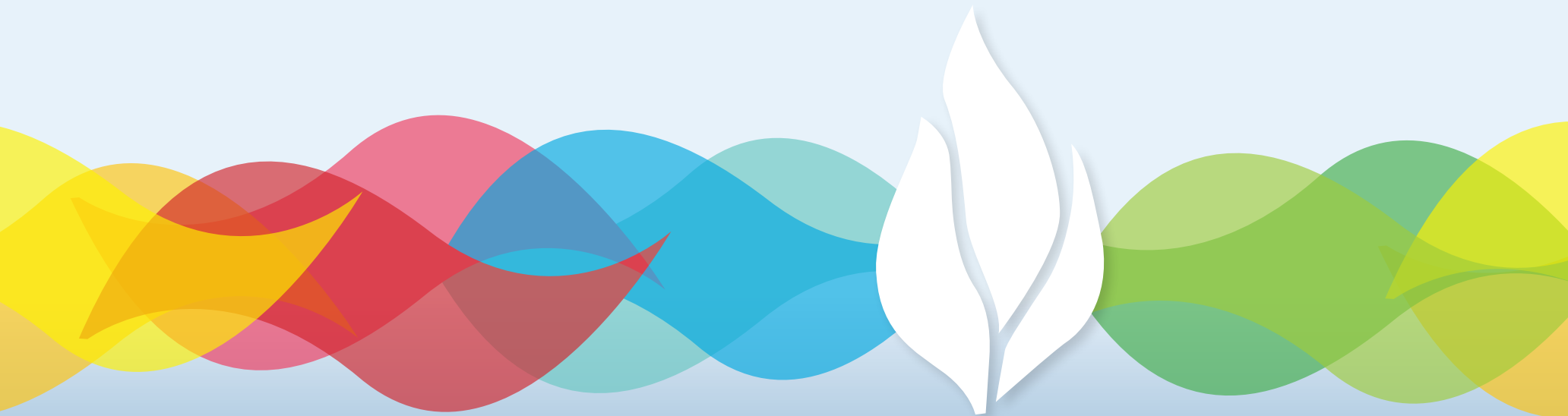


2017  
ANNUAL REPORT

It's more than a donation.

It's your Legacy.





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It's more than a donation.  
**It's your Legacy**



**The mission of the Jewish Federation of Omaha Foundation is to help assure the stability and continuity of Jewish life and to support communal services in the Omaha area by establishing and accumulating enduring assets for permanent funding resources.**

Cover Photo - Julie Phillips with granddaughter Mara  
Individuals pictured in this Annual Report are not necessarily recipients of Foundation grants. All photos taken at programs and activities that have received funding from the Foundation.

## PRESIDENT'S MESSAGE



It has been my honor and pleasure to report to you the excellent progress, accomplishments and activities of our Foundation during these last four years. Serving as Foundation President has truly been the most meaningful philanthropic activity that I have personally ever been involved with. Our Foundation donors and board members are sincerely committed to making our community a better place for current and future generations.

Effective July 1, 2017, Ted Friedland assumed the presidency of our Foundation. We are pleased and excited that Ted has accepted this responsibility, and I have no doubt that he will provide excellent leadership moving forward and continue to build on the successful programming, activities and investment strategies of our Foundation. We are excited that David Gilinsky has accepted the position of Vice President. We have also added two new board members, Bob Belgrade and Marty Ricks. Both of these individuals have had high profile presence as leaders in our community for a number of years, and we are confident they will be great additions to our board.

I am pleased to report that for the fiscal year ending June 30, 2017, our managed assets increased from \$73.9 million to \$80.9 million. This represents an increase of 9.5%. Our investment returns for last year also exceeded 9% from our Boston and Chicago pooled investments. In the last year, we have further diversified our investments to include a Vanguard Life Strategy Conservative Growth Fund. I must praise the excellent work of our Investment Committee, led by Murray Newman, for their diligence in protecting and growing our assets. During the last year, the Foundation added four new donor-advised funds, bringing our total

to 111. We also added 10 new endowment funds, bringing that total to 309. Over the last four years, we added a total of 75 new funds, not including the 53 funds added by our teenage community members through the Jewish Federation's Young Jewish Giving Program. I must give kudos to our young teenagers for learning how to give back to our community at this stage of their lives, which hopefully will lead to their giving back as adults. I must also recognize Danielle Gordman for her work in leading this program.

As proud as we are of last year's accomplishments and growth, the results of our LIFE & LEGACY program over the last three years far exceed anything we could have ever imagined. Arguably, this will be the most successful single fundraising event in the history of our community. We have added over 400 Legacy pledges, which should result in over \$17 million in gifts to help meet the future needs of our community in the decades ahead. Thanks must go to the Harold Grinspoon Foundation for providing the plan, as well as some of the funding, to make this happen. I must also thank the staff and volunteers with all of our partner entities, as well as the group of approximately 15 local donors who provided the necessary seed money to get the program up and running.

I cannot conclude this report without recognizing our professional staff led by Howard Epstein, our Executive Director, Janet Henthorn, Laurie Peatrowsky, Linda Pollard and Margo Parsow. They represent the backbone of the Foundation and none of the results or achievements I have mentioned would be possible without their hard work.

A handwritten signature in black ink, appearing to read 'Carl Riekes', written in a cursive style.

Carl Riekes  
President

## EXECUTIVE DIRECTOR'S MESSAGE



In the few seconds it takes for a short elevator ride, I can unequivocally state that the Jewish Federation of Omaha Foundation helps people realize their philanthropic dreams, giving them the opportunity to dedicate their hard-earned dollars to charitable causes near and dear to them, and to benefit the Jewish community as well as the broader secular community.

During the fiscal year ending June 30, 2017, our donors made a tremendous impact. Their endowments, donor-advised funds and supporting foundations:

- Provided \$215,000 for scholarships to help our Jewish youth attend college, Jewish summer camps, the Pennie Z. Davis Child Development Center, and the Friedel Jewish Academy, travel to Israel, and attend Jewish youth group conferences.
- Supported the Jewish Federation of Omaha and its agencies with funding totaling almost \$2.7 million, including \$935,000 to help Omaha's Jewish needy and elderly.
- Extended \$798,000 to local synagogues and Jewish organizations from donor-advised funds.
- Funded programs and initiatives for other local and national secular charities in the amount of \$813,000 from donor-advised funds.

Planning for after-lifetime gifts is increasingly essential to the long-term financial stability of Omaha's Jewish community, and we are forever grateful to those who passed away this year after naming the Foundation and the Federation as beneficiaries of their estates. During fiscal 2017, almost \$2.3 million was added to assets under management at the Foundation through these after-lifetime gifts, including charitable

remainder trusts, life insurance and bequests.

Profound thanks to all who have committed to after-lifetime gifts for Omaha's Jewish philanthropic organizations through the LIFE & LEGACY™ initiative. In just over three years, 305 Omahans and former Omahans have made 590 legacy gift commitments with an estimated value of \$17 million.

Sincere thanks go to the hard working, dedicated and energized Foundation staff: Office Manager Janet Henthorn; Fund Administrator/Marketing Coordinator Laurie Peatrowsky; LIFE & LEGACY Coordinator Margo Parsow; and Endowment Assistant/Staff Writer Linda Pollard. If you have had dealings with them, you know how truly capable, competent, and helpful they are.

Thanks also to the Foundation Board of Directors, who oversee our growth, direction, and development. Foundation President Carl Riekes led the board the past four years, and I sincerely thank Carl for his leadership, insight and dedication to the Foundation and to Omaha's Jewish community. He always has our best interests in his heart and in his soul, in his words and in his deeds. It has been a pleasure working with Carl, and I know his dedication and energy will continue as he takes the role of past-president of the board.

At the same time, hearty congratulations go to Ted Friedland, who takes the reins as President of the Foundation. I am confident the Foundation will continue to flourish under Ted's leadership. I look forward to working closely with him.

With sincere thanks,

A handwritten signature in black ink that reads "Howard N. Epstein". The signature is fluid and cursive.

Howard N. Epstein  
Executive Director



# The Alan & Annie Fleishman Scholarship Fund Grows through Love and Thoughtful Planning

**I**t all started in a bowling alley many years ago. Dorothy Ann “Annie” Blair, born and raised in Webb, Iowa, first met Alan Fleishman, the Omaha native, when they both were bowling in invitational leagues. This shared hobby drew them together, but the love that developed is what kept them together until Alan’s death in 1985. Annie and Al were married in August of 1957, first in a civil ceremony, and then a day later in a Jewish wedding in Denver officiated by Rabbi Joseph Freedman. They shared 28 years of marriage.

Al was a Central High School graduate, continuing on to the University of Nebraska in Lincoln. During and after high school, Al sang in a quartet. He served in the Coast Guard for two years. Al was the Vice President and General Manager of all the Village Inn restaurants in Omaha, and Annie worked for a utility company for the first few years of their marriage. She was an American Red Cross volunteer, with 33 years of service to that organization.

Both Annie and Al were only children, and did not have children of their own. Nevertheless, they both loved children, and this would be evident in their estate planning. Al was sick for a long-time before his death, and during this time, he and Annie had discussions about what they would do with their estate. An endowment that helped young people was a natural choice for them.

In October of 1994, nine years after Alan’s death, Annie established the Alan and Annie Fleishman Scholarship Fund. The fund awards scholarships to Omaha area Jewish students who have financial need to attend a college or university of their choice. The first scholarship was awarded in 1992, and the fund has continued helping students pursue higher education ever since.

Marty Ricks, former Foundation Executive Director, recalled meeting Annie,

“I met Annie for lunch probably ten years ago. It was one of those ‘three martini’ lunches, without the martinis. She talked fondly about her late husband, Al, and the wonderful life they had. Although a mixed marriage, Annie embraced Judaism to the fullest. She told me her and Al’s plan was already in place to benefit the



Alan and Annie Fleishman

Jewish Federation of Omaha after her death, doing it through the Jewish Federation of Omaha Foundation. It was wonderful that they chose to help college kids with financial need. They were certainly cognizant of the exploding cost of college tuition over the past many decades.”

Annie thoughtfully planned for the time when she would no longer be here. She named the Jewish Federation of Omaha Foundation as beneficiary of a life insurance policy, with the money to be directed to her scholarship fund. Nine days before her 95th birthday, on January 17, 2017, Annie passed away.

The legacy of Annie and Al is, and will continue to be, the many students who have attended college or university due the Fleishmans’ generosity. What a wonderful legacy for a hometown boy and a girl from Webb, Iowa. On behalf of all the students past, present and future, thank you, Annie and Al.



Jane Cohen with her grandchildren



“Jewish Omaha is a uniquely cohesive community, the likes of which are not found in other parts of the country. It has been a very important part of our and our children’s lives ever since we moved here 30 years ago, and although we don’t have any kids or grandkids living here anymore, we need to keep it going.”

CAROLE AND WAYNE LAINOF

# Funds providing income for the annual budget of the Jewish Federation of Omaha and its Agencies

## JEWISH FEDERATION OF OMAHA

- Bette R. and Samuel **Alloy** Endowment
- Jane H. **Brooks** Endowment
- **B'nai Jacob Adas Yeshuron** Synagogue Fund
- **B'nai Jacob Anshe Sholom** Synagogue Fund
- Max and Betty **Falk** Jewish Education Endowment
- **Friedland** Family JCC Campus Maintenance Endowment
- Roz and Ike **Friedman** Endowment
- Arthur and Ruth **Goldstein** Endowment
- **Gotsdiner** Family Endowment
- Morton **Ives** Unrestricted Endowment
- Eve **Katskee** Jewish Press Endowment
- Rabbi Myer S. and Dorothy **Kripke**  
Jewish Press Support Fund
- Carole and Wayne **Lainof** Endowment
- Stanford **Lipsey** Jewish Press Endowment
- **Livingston** Jewish Community Center Endowment
- Ephraim L. **Marks** Federation Endowment
- Herman and Mary **Meyerson** Endowment Fund
- Jule M. and Doris J. **Newman** Endowment
- Phyllis H. and E. Robert **Newman** Endowment
- Morton A. **Richards** Endowment
- Dorothy L. and Max **Riekes** Endowment
- Ted and Dorothy **Blacker Rothkop** Endowment
- Phyllis and Irvin **Sherman** Family Endowment
- Judith A. and Gerald B. **Simons** Endowment
- Maxine and Milton **Simons** Endowment
- **Staenberg** Federation Endowment
- Selma and Isidore M. **Tretiak** Endowment
- Paul **Veret** Endowment Fund
- Anna E. and Benjamin **Wiesman** Endowment
- Anna E. and Benjamin **Wiesman** Endowment  
for the Jewish Press
- Ann H. and William H. **Wolfson** Endowment
- Center for Jewish Life Campaign Legacy Fund
- Community Relations Committee  
Campaign Legacy Fund
- Free Loan Fund
- Heritage Allocation Fund
- Jewish Community Center Campaign Legacy Fund
- Jewish Community Center Endowment
- Jewish Education Endowment
- Jewish Federation of Omaha Unrestricted Endowment
- Jewish Press Campaign Legacy Fund

## JEWISH SOCIAL SERVICES

### JEWISH FAMILY SERVICE

- Jewish Family Service Campaign Legacy Fund
- Jewish Family Service Endowment

### JEWISH SENIOR OUTREACH

- **Chapman/Cherniak/Sher** Fund
- Lillian and Phillip **Crandell** Memorial Fund
- Herbert R. and Ruth L. **Forbes** Memorial Fund
- Celia and Nathan **Grossman** Endowment
- Dr. Isaac and Betty **Sternhill** Endowment
- Community Seniors Endowment
- Jewish Senior Outreach Campaign  
Legacy Fund

### ROSE BLUMKIN JEWISH HOME

- Sylvan **Block** Endowment
- Rose **Blumkin** Jewish Home Endowment
- Loyal B. and Lorene **Cohn** Endowment
- Hazel **Degen** Bequest Fund
- Max and Betty **Falk** Rose Blumkin  
Jewish Home Endowment
- Isadore H. and Rose K. **Weiner** Trust Fund
- Eli M. and Sara **Zalkin** Endowment





# Funds providing income for designated purposes of the Jewish Federation of Omaha and its Agencies

(for Scholarships, Books, Equipment, Israel Trips and a Wide Variety of Programs and Projects)

## JEWISH COMMUNITY CENTER

### B'NAI B'RITH YOUTH ORGANIZATION

- Dr. Abe **Greenberg**/B'nai B'rith/**Henry Monsky Lodge** Endowment
- B'nai B'rith Youth Organization Program Resource Fund
- Omaha B'nai B'rith Youth Organization Endowment

### PENNIE Z. DAVIS CHILD DEVELOPMENT CENTER

- Pennie Z. **Davis** CDC Staff Education Fund
- Eileen S. **Erman** Child Development Center Endowment
- Arthur H. and Ruth M. **Goldstein** Family Endowment
- Robert M. **Nelson** Scholarship Endowment (Future Fund)
- Ernie and Adalynn **Nogg** Memorial Endowment
- Suzanne **Richards Singer** Endowment
- Harold S. **Tuchman** Family Endowment
- Allen and Monie **Zalkin** Memorial Endowment
- JCC Child Development Center Endowment

### JCC PROGRAMMING & OTHER PURPOSES

- Al **Clayman** Memorial Endowment
- Arthur H. and Ruth M. **Goldstein** Family Endowment
- Harvey and Marcia **Lipsman** JCC Youth Endowment
- Myron (Mike) **Milder II** Memorial Fund
- Bettie and Stuart **Muskin** JCC Youth Sports Fund
- Ernie and Adalynn **Nogg** Memorial Endowment
- Dr. Jay **Parsow** Youth Basketball Scholarship Fund
- Johnny **Rosenblatt** Memorial Student Athlete Endowment
- Jack **Saferstein** Memorial Fund
- Ann **Woskoff Schulman** Memorial Fund
- Allen and Monie **Zalkin** Memorial Endowment
- JCC Building Fund
- JCC Program Scholarship Endowment
- JCC Theatre Program Endowment





Paulette and Hersz Flatowicz at the RBZH County Fair Event

## JEWISH SOCIAL SERVICES

### JEWISH FAMILY SERVICE

- Paul **Alperson** Endowment
- Steven **Bloch** President's Fund
- Pennie Z. **Davis** Family Life Education Fund
- Nathan and Rose Lillian **Fine** JFS Tzedakah Fund
- Ike **Friedman** JFS Financial Assistance Fund
- Louis **Friedman** Fund for New Americans
- **Glazer** Family Endowment
- Edith and Paul **Goldstein** Endowment
- Samuel and Delma **Goodman** Youth Fund
- Paul and Joy **Grossman** Family Endowment
- **Harris** Family Endowment
- Sol **Kutler** Dental Fund
- Richard "Pete" **Lee** Memorial Endowment
- Ruth and Otmar **Liebenstein** JFS Financial Assistance Endowment
- **Lippett** Family Endowment
- Jerome J. and Frances O. **Milder** Endowment
- Nancy **Noddle** JFS Financial Assistance Fund
- **Parsow** and **Simons** Families Special Needs Community Fund

- **Perlmeter** Family Jewish Family Service Assistance Fund
- Ruth and Bernard **Raskin** Endowment
- Leo and Frances **Rodick** Memorial Endowment
- Rosalie and Milton **Saylan** Endowment for JFS
- Mickey (**Sturm**) **Stern** Memorial Endowment
- Harry and Fannie **Stock Rothkop**/Theodore **Rothkop** Endowment
- Mark and Sophie **Sturm** Immigrant Education Fund
- Jake and Mary **Wine** Fund
- Yachad Endowment

### JEWISH SENIOR OUTREACH

- Merriam and Harold **Cooperman** Senior Services Fund
- Sam and Rosaline **Epstein** Senior Outreach Fund
- **Glazer** Family Endowment
- Shane and David **Kotok** Senior Outreach Fund
- Sol **Kutler** Dental Fund
- **Lippett** Family Endowment
- L.O.V.E. Fund
- Bettie and Stuart **Muskin** JSS Endowment
- Al and Vivian **Oruch** Memorial Fund
- Ruth **Riekes Richards** Memorial Fund
- Ervin and Miriam **Simon** Endowment

### ROSE BLUMKIN JEWISH HOME

- Sheldon A. and Lorrie **Bernstein** Endowment
- Rose **Blumkin** Fund
- David and Helen **Brodkey** Endowment for RBZH
- Jacob and Lillian **Brookstein** Endowment
- Mayer and Tillie **Cohen** Social and Cultural Endowment
- Arthur G. **Epstien** Memorial Fund
- **Erman** Family Torah Repair Fund
- Dr. Abraham D. and Liberty J. **Faier** Memorial Endowment
- Esther **Fox** Memorial Fund
- Carl L. **Frohm** Repair Endowment

- Julius **Froom** and Phil and Minnie **Freeman** Restricted Endowment Fund
- Donald and Andi **Goldstein** Leadership Development Endowment
- Deborah and Arthur M. **Greene** Endowment
- Fred and Ruth **Hahn** Endowment
- Adele **Hornstein** Rose Blumkin Jewish Home Professional Staff Education Fund
- David **Katzman** Endowment
- Shirley and Arthur **Kulakofsky** Endowment
- Betty A. **Studna** and Seymour T. **Lee** Endowment
- Harriett **Lobel** Endowment
- Chester and Phyllis **Lustgarten** Endowment
- Ephraim L. **Marks** RBZH Endowment
- Betty **Marx** Activities Endowment
- **Meyers** Family Legacy of Laughter Endowment
- Leo I. and Helen P. **Meyerson** RBZH Endowment
- Dan **Miller** Endowment
- **Parsow** Family Endowment
- Janet S. **Perlmeter** Memorial Courtyard Maintenance Fund
- Shelly **Nogg Pichik** Field Trip Fund
- David S. **Rice** and Esther **Zorinsky Rice** Endowment for RBZH
- Charlotte and Eugene **Rich** Endowment
- Samuel and Bess **Rothenberg** Transportation Fund
- Rosalie and Milton **Saylan** Endowment
- Jack J. and Sonia **Schrager** Endowment
- Ted and Sarah **Seldin** Family RBZH Activities Endowment
- Helen and David **Shukert** L.O.V.E. Scholarship Fund
- Norma and Stanley **Silverman** Endowment
- Marion and Dave **Wine** Endowment
- Janet **Wintroub** Sing-A-Long Fund
- Sara Rose **Woskoff** Arts and Crafts Resource Fund
- Religious Programming Fund

# JEWISH FEDERATION OF OMAHA

## JEWISH FEDERATION KRIPKE LIBRARY

- Dr. Morris and Dale Deborah **Brodkey** Memorial Endowment
- Lt. Irving **Cohen** Memorial Endowment
- Dorothy Diva Fund (Dorothy **Kaplan**)
- Shirley and Leonard **Goldstein** Endowment
- Dorothy K. **Kripke** Children's Book Fund
- Rabbi Myer S. and Dorothy K. **Kripke** Library Endowment
- Elinor A. and Norman **Whitman** Memorial Book Appreciation Fund
- Dora **Wolfson** Memorial Library Endowment

## JFO PROGRAMMING & OTHER PURPOSES

- Milton R. and Pauline S. **Abrahams** Endowment
- Ruth **Frisch** and Oscar S. **Belzer** Endowment
- Dr. Bernard H. **Bloom** and Dr. Bruce S. **Bloom** Memorial Endowment
- Bruce **Fellman** Memorial Young Leadership Award Endowment
- JFO **Friedland Steiner Boggust** Endowment
- Arthur H. and Ruth M. **Goldstein** Family Endowment
- Paul and Edith **Goldstein** Family Endowment
- Robert and Ellen **Gordman** Jewish Teen Leadership Fund
- Philip M. and Ethel **Klutznick** Program for Studies in Jewish Civilization Fund
- Aaron H. and Ruth **Somberg Krantz** Fund
- Sadie and Harry **Kulakofsky** Memorial Fund
- Edith and Nathan **Meltzer** Memorial Endowment
- Avy L. and Roberta L. **Miller** Family Film Fund
- Gertrude T. and Albert B. **Newman** Endowment
- Morton A. **Richards** Endowment
- Morton A. **Richards** Youth Endowment
- Samuel and Bess **Rothenberg** Memorial Endowment
- Lois Jeanne **Schrager** Memorial Fund
- Frederick J. **Simon** Memorial Endowment
- Kenneth Ray **Tretiak** Memorial Fund
- Federation LIFE & LEGACY Endowment
- Jewish Genetic Testing Endowment

- Lay Seminar Fund
- Youth Foundation Fund

## SCHOLARSHIPS

- Lenore **Simon Aronson** Educational Fund
- David E. **Beber** Scholarship Fund
- Truman and Rosemary **Clare** Scholarship Endowment
- Henry A. **Davis** Custodial Fund
- Leo and Aileen **Eisenstatt** Scholarship Fund
- Barry E. **Epstein** Memorial Healthcare Fund
- **J.W.V. Epstein - Morgan Post #260 - Nathan Marcus** Memorial Scholarship Fund
- Sandra L. **Feldman** Memorial Scholarship Fund
- Nathan and Rose Lillian **Fine** Fund for the Education of Students of the Jewish Faith
- Alan and Annie **Fleishman** Scholarship Fund
- David W. and Minnie **Frank** Memorial Scholarship Fund
- Rebecca **Friedman** Scholarship Fund
- Carl L. **Frohm** Educational Custodial Fund
- Marvin **Gilman** Scholarship Fund
- Ann **Goldstein** Education Programming Endowment Fund
- Leonard and Shirley **Goldstein** Family Endowment
- Herbert **Goldsten** Scholarship Fund
- Samuel and Delma **Goodman** Youth Fund
- Dr. Abe **Greenberg**/B'nai B'rith/**Henry Monsky Lodge** Endowment
- Nancy and Don **Greenberg** Scholarship Fund
- **Harris** Family Endowment
- Ellen **Canar Joseph** Memorial Endowment
- Samuel and Ida **Kaiman** Endowment
- Ben E. **Kaslow** Scholarship Fund
- David **Katzman** Endowment
- Maxine and Joe **Kirshenbaum** Scholarship Fund
- Betty **Margel** Scholarship Endowment
- David J. and Sue **Meyers** Jewish Experience Scholarship Endowment

- Albert M. and Jeanette T. **Nepomnick** Educational Fund
- Carolyn **Kully Newman** Memorial Fund
- Esther K. **Newman** Memorial Fund
- Gertrude T. and Albert B. **Newman** Endowment
- David S. **Rice** and Esther **Zorinsky Rice** Endowment
- Joe M. and Ruth E. **Rice** Scholarship Fund
- Dorothy **Lustgarten Riekes** Childrens' Cultural Arts Endowment
- Burton L. **Robinson** Student Athlete Scholarship Fund
- Jerold I. and Sheila E. **Rosen** Endowment
- Lois Jeanne **Schrager** Memorial Fund
- Phillip and Terri **Schrager** Supporting Foundation
- Nate H. and Beatrice **Sherman** Scholarship Fund
- Ruth **Sokolof** Special Education Scholarship Fund
- Benjamin and Elizabeth "Bess" **Stern** Scholarship Fund
- Lillian **Keiser Stoms** Educational Fund
- David **Keiser** and Lillian **Keiser Stoms** Foundation Education Endowment
- David **Keiser** and Lillian **Keiser Stoms** Foundation Education Endowment for Academic Excellence
- Ann H. and William H. **Wolfson** Endowment
- Edward **Zorinsky** Endowment
- CornerStones Fund
- Passport to Israel Program Fund



## ESTABLISHED FUNDS DESIGNATED FOR THE JEWISH FEDERATION ANNUAL CAMPAIGN

- Norman B. and Frances P. **Batt** PACE Fund
- Dr. Mark **Brodkey** PACE Fund
- Leo and Aileen **Eisenstatt** PACE/LOJE Fund
- Roz **Friedman** and Susan **Friedman Cohn** LOJE Fund
- Thama Lee **Friedman** PACE Fund
- Ned N. and Pearl R. **Giventer** PACE/LOJE Fund
- Ann **Goldstein** LOJE Fund
- Marcel and Ilse **Kahn** PACE Fund
- Marilyn T. **Kaplan** Fund
- Forrest Nathan and Lisa **Stewart Krutter** PACE Fund
- Steven and Bonnie **Levinger** PACE Fund
- Dr. Sidney **Mirvish** Memorial PACE Fund
- Bettie and Stuart **Muskin** PACE Fund
- E. Robert and Phyllis H. **Newman** PACE Fund
- Martin **Ricks** PACE Fund
- Henry and Dorothy **Riekes** Endowment
- Lorraine **Silverman** Annual Campaign Endowment
- Phil and Ruth **Sokolof** Honor Roll Fund
- Cari **Sommer** Memorial LOJE Fund
- Special Donor-Advised Fund
- Maurice and Joan **Udes** PACE Fund
- Norman and Joodi **Veitzer** Fund

## JEWISH FEDERATION OF OMAHA FOUNDATION

- David and Helen **Brodkey** Endowment for the Foundation
- Yale **Richards** Professional Education Endowment
- Pardes Foundation

## LIFE & LEGACY FUNDS

*Providing income for the various nine partners (see pages 21-23 for more information)*

- Sandra **Belgrade** LIFE & LEGACY Endowment
- Arthur and Betsy **Davidson** LIFE & LEGACY Endowment
- Gary and Barbara **Goldstein** LIFE & LEGACY Endowment
- Steve and Thelma **Lustgarten** Endowment
- Vicki **Perlmeier** LIFE & LEGACY Endowment

## SUPPORTING FOUNDATION AND SPECIAL GRANTS COMMITTEES

- Albert and Eleanor **Feldman** Family Israel Supporting Foundation
- Shirley and Leonard **Goldstein** Supporting Foundation
- Bennett G. **Hornstein** Endowment
- Karen **Sokolof Javitch** Music Fund
- Milton S. and Corinne N. **Livingston** Foundation Fund
- Carolyn **Kully Newman** Memorial Fund
- Esther K. **Newman** Memorial Fund
- Murray H. and Sharee C. **Newman** Supporting Foundation
- Phillip and Terri **Schrager** Supporting Foundation
- Lazier L. **Singer** Memorial Fund for Youth
- Phil and Ruth **Sokolof** Honor Roll Fund
- Special Donor-Advised Fund

## MULTI-PURPOSE FUNDS & OTHER

- Robert **Eisenberg** Endowment
- Beverly **Fellman** Best French & Best Hebrew Award Endowment

- Jean **Finnell Henderson** Memorial Scholarship Fund
- Heartland Holocaust Educational Fund (Frances and Sam **Fried**)
- Ann **Goldstein** Outstanding Young Leader Award Endowment
- Gary **Javitch** Family Endowment
- Robert I. **Kully** Endowment
- Louis S. **Kully** and Debra J. **Kully** Endowment for Mt. Sinai Cemetery in Hasting, NE
- **Livingston** Plaza Custodial Fund
- Yale **Richards** Memorial Endowment
- Vivian and Morton **Schwarz** College Scholarship Fund
- Sigma Alpha Mu University of Nebraska Scholarship Fund

## FUNDS MANAGED FOR THE JEWISH FEDERATION OF OMAHA

- David W. and Minnie **Frank** Scholarship Fund Endowment for the Jewish Federation of Omaha
- Gary and Barbara **Goldstein** Endowment for the Jewish Federation of Omaha
- Marcel and Ilse **Kahn** Endowment for the Jewish Federation of Omaha
- Phil and Marian **Kutler** Endowment for the Jewish Federation of Omaha



## SUPPORT FOR PARTNERS / AFFILIATES / OTHER ORGANIZATIONS

### ANTI-DEFAMATION LEAGUE - COMMUNITY RELATIONS COMMITTEE

- Jule M. **Newman** Memorial Anti-Bigotry Endowment

### BETH EL SYNAGOGUE

- Beth El Synagogue LIFE & LEGACY Endowment

### BETH ISRAEL SYNAGOGUE

- Jake and Susan **Besser** Israel Experience Endowment
- The Hillel Fund

### B'NAI B'RITH/HENRY MONSKY LODGE

- Adam **Jacobs** Memorial Tribute Scholarship Fund
- B'nai B'rith Edward **Zorinsky** Fund

### CHABAD LUBAVITCH OF NEBRASKA

- Ann **Cohen** Memorial Chabad Education Fund
- Forrest Nathan and Lisa **Stewart Krutter** Endowment

### FRIEDEL JEWISH ACADEMY

- Nathan and Rose Lillian **Fine** Endowed Teacher of the Friedel Jewish Academy
- Leonard L. and Phyllis J. **Friedel** Family Endowment
- Roxann **Lebowich Lavorato** Memorial Endowment
- Eli and Rose **Schupack** Library Endowment

### INSTITUTE FOR HOLOCAUST EDUCATION

- Institute for Holocaust Education LIFE & LEGACY Endowment

### NEBRASKA JEWISH HISTORICAL SOCIETY

- Bob **Belgrade** NJHS Endowment
- Gerald and Pearl **Osoff Gross** Endowment
- David and Rose **Katzman** Endowment
- Henry and Dorothy C. **Riekes** Museum Maintenance Endowment
- Henry and Dorothy C. **Riekes** Museum Occupancy Endowment
- Rosalie and Milton **Saylan** NJHS Endowment
- Mickey and George **Shafer** Endowment Fund for NJHS
- Marlene W. **Hechtman** and Martin M. **Stenberg** Family NJHS Oral History Project Endowment
- NJHS - 5th Commandment Sustaining Fund
- Nebraska Jewish Historical Society Custodial Fund
- Nebraska Jewish Historical Society LIFE & LEGACY Endowment

## GIFTS THAT MATURE IN THE FUTURE

### Charitable Remainder Trusts:

Arthur Grossman  
Morton A. Ives  
Charles A. and Lyra Ann Monasee  
Murray H. Newman  
Ruth E. Raskin  
Morton Richards Charitable Trust #2  
Jeanne Lipsey Rosenblum

### IN MEMORY OF OUR FOUNDATION ENDOWMENT DONORS WHO PASSED AWAY IN 2016-2017

(July 1, 2016 – June 30, 2017)

#### Bette Alloy

Bette R. and Samuel Alloy Endowment

#### Dorothy "Annie" Fleishman

Alan and Annie Fleishman Scholarship Fund

#### Richard Glazer

Glazer Family Endowment

#### Shirley Goldstein

Leonard & Shirley Goldstein Family Endowment  
Shirley & Leonard Goldstein Endowment  
Shirley & Leonard Goldstein Supporting Foundation

#### Stanford Lipsey

Stanford Lipsey Jewish Press Endowment

#### Sheila Rosen

Jerold I. and Sheila E. Rosen Endowment

#### Norma and Stanley Silverman

Norma and Stanley Silverman Endowment

#### Maxine Simons

Maxine and Milton Simons Endowment  
Parsow and Simons Families Special Needs  
Community Fund

#### Joodi Veitzer

Norman and Joodi Veitzer Fund

#### Ann Wolfson

Ann H. & William H. Wolfson Endowment

#### LIFE & LEGACY

#### Edith "Toby" Fellman

#### Barton H. Greenberg

#### Sylvia Jess

#### Norma and Stanley Silverman

## LION OF JUDAH ENDOWMENT

A Lion of Judah Endowment (LOJE) Fund is created by establishing a fund of at least \$100,000 in the donor's name, ensuring the perpetuation of a donor's Lion of Judah giving level annual campaign gift. It can help you manage your philanthropy in a way that complements your overall tax planning. For example, if you have unusually high income or substantial long-term capital gains in a particular year, you can contribute to your LOJE Fund, and receive your charitable tax deduction that year. Your estate could receive considerable tax benefits if you choose to establish your LOJE Fund with an after-lifetime gift. A LOJE Fund is a powerful statement of a donor's commitment to tzedakah, providing a legacy for herself, her family and her community.

### LOJE Donors:

Carol Bloch	Roz Friedman*	Sharee Newman	Zoë Riekas
Susan Cohn	Pearl Richman Giventer*	Nancy Noddle	Kimberly Robinson
Aileen Eisenstatt*	Ann Goldstein*	Patty Nogg	Terri Schragar
Lisa Epstein	Shirley Goldstein*	Dorothy (Mrs. Henry) Riekas*	Cari Sommer*
Sandy Epstein	Sally G. Malashock		Joodi Veitzer*



Sandy Epstein and daughter Kari Tauber

## PERPETUAL ANNUAL CAMPAIGN ENDOWMENT

A Perpetual Annual Campaign Endowment (PACE) is a permanent fund dedicated to endowing a Jewish Federation of Omaha Annual Campaign gift. A PACE fund is not intended to take the place of any current annual gift – it is instead a lasting legacy that will continue to make an annual gift to the campaign in perpetuity on your behalf. You may create your PACE fund through a variety of vehicles, some of which provide your estate with considerable tax benefits without the requirement that you contribute during your lifetime. These options allow you to perpetuate your commitment to the Federation Annual Campaign in a way that best achieves your own personal financial and estate planning goals.

### PACE Donors:

Joel Alpersen	Thama Lee Friedman*	Edward M. Malashock	Martin Ricks
Norman & Frances Batt*	Ned N. Giventer*	Joe & Tina Meyers	Carl Riekas
Steven Bloch	Jan Goldstein	Sidney Mirvish*	Henry Riekas*
Mark Brodkey	Leonard Goldstein*	Allan & Janie Murow	Andrew Robinson
Leo Eisenstatt*	Andrea & Marc Hamburg	Bettie & Stuart* Muskin	Phillip Schragar*
Gary Epstein	Marcel & Ilse Kahn	E. Robert & Phyllis Newman	Janet and Jerry Slusky
Paul Epstein	Howard & Gloria Kaslow	Murray Newman	Maurice* & Joan Udes
Michael Erman	Forrest N.* & Lisa Stewart	Jay Noddle	Norman Veitzer
Ted & Jamie Friedland	Krutter	Steven Nogg	

### Annual Campaign Endowment (Term of Years) Donor:

Phil Sokolof\*

\*Of blessed memory

## Balance Sheet - June 30, 2017

<b><u>ASSETS</u></b>	07/1/16 <u>Beginning</u>		06/30/17 <u>Ending</u>		<u>Change</u>
Chicago Pooled Endowment Portfolio	\$43,672,815	59.02%	\$23,568,940	29.11%	(\$20,103,875)
Vanguard Life Strat. Conservative Growth Fund	0	0.00%	23,025,582	28.44%	23,025,582
Boston Jewish Community Endowment Pool	19,300,432	26.08%	22,470,873	27.76%	3,170,441
Corporate Bonds	3,918,951	5.30%	4,424,407	5.47%	505,456
Short-term Investments	1,892,110	2.56%	2,062,706	2.55%	170,596
Alternative Investments	1,744,341	2.36%	2,030,721	2.51%	286,380
RBJH Capital Project and JFO Receivable	1,800,000	2.43%	1,776,774	2.19%	(23,226)
Common Stocks	1,547,783	2.09%	1,528,200	1.89%	(19,583)
U.S. Government Securities	<u>120,781</u>	<u>0.16%</u>	<u>64,983</u>	<u>0.08%</u>	<u>(55,798)</u>
<b>Managed Assets</b>	73,997,213	<u>100.00%</u>	80,953,186	<u>100.00%</u>	6,955,973
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	2,292,028		2,351,884		59,856
Funds Held and Invested for Benefit of Federation or Its Agencies:					
Jewish Federation Reserve Funds	(1,536,422)		(1,802,285)		(265,863)
Custodial Funds	<u>(5,603,777)</u>		<u>(7,106,468)</u>		<u>(1,502,691)</u>
<b>Total Assets</b>	<u>\$69,149,042</u>		<u>\$74,396,317</u>		<u>\$5,247,275</u>
<b><u>FUND BALANCES</u></b>					
Restricted or Designated Endowments	\$40,947,607	59.22%	\$44,869,471	60.31%	\$3,921,864
Donor-Advised Funds	20,039,056	28.98%	21,448,390	28.83%	1,409,334
Unrestricted Endowments	5,741,743	8.30%	5,589,141	7.52%	(152,602)
Supporting Foundations	128,608	0.19%	137,431	0.18%	8,823
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	<u>2,292,028</u>	<u>3.31%</u>	<u>2,351,884</u>	<u>3.16%</u>	<u>59,856</u>
<b>Total Fund Balances</b>	<u>\$69,149,042</u>	<u>100.00%</u>	<u>\$74,396,317</u>	<u>100.00%</u>	<u>\$5,247,275</u>





Left Photo: Doris Parker, Deirdre Evans and Phyllis Brown. Top Right Photo: JCC Dancers at the Backyard Concert Series. Bottom Right: Morris, Alan and Cindy Friedman at Jewish Heritage Day at Werner Park.

## Statement of Support, Revenue, Allocations and Expenses

July 1, 2016 - June 30, 2017

Beginning Fund Balances - 07-01-16	<u>\$69,149,042</u>
Lifetime Gifts and Contributions	5,529,197
Investment Income	5,867,093
Grants and Allocations	(5,410,897)
Beneficiary Income Payments	(150,704)
Administration Fees	(506,807)
Investment Fees	<u>(80,607)</u>
<b>Net Change in Fund Balances</b>	<u>5,247,275</u>
<b>Ending Fund Balances - 06-30-17</b>	<u>\$74,396,317</u>

## Jewish Federation of Omaha Foundation Financial Highlights as of June 30, 2017

### A - Summary of fiscal year activity for all funds\*

Current value of funds	\$80,953,186
Current number of funds	521
Current number of donor-advised funds	111
Current number of Young Jewish Giving funds	101
Current number of endowment funds	309
Number of new funds in 2016-2017 (includes 47 new Young Jewish Giving funds)	61

### Change in funds from June 30, 2016 to present:

New contributions	\$5,529,197
Investment performance	5,867,093
Grants & Distributions	(5,410,897)
Other	<u>(728,118)</u>
<b>Total</b>	<u>\$5,247,275</u>

\*Comprised of all managed assets including segregated assets, Federation and custodial funds, life insurance policies and charitable remainder trusts.

### B - History of our invested portfolio at market value\*\*

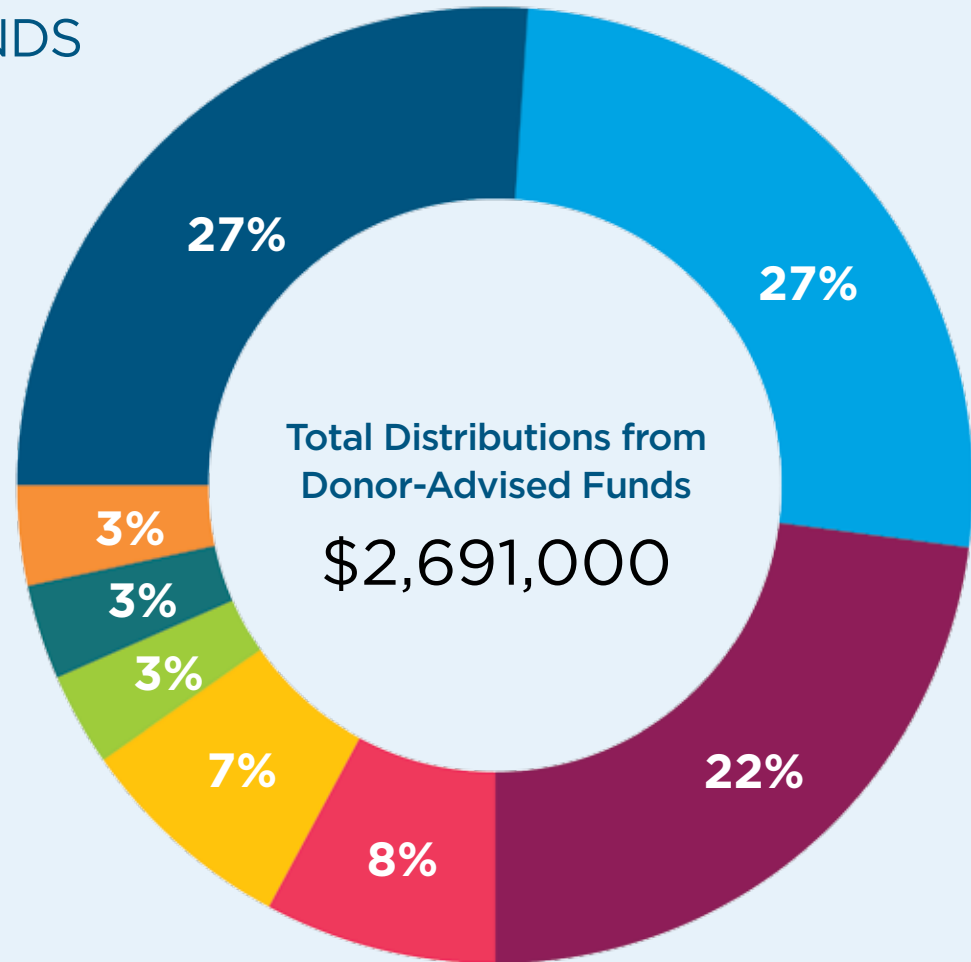
		(\$ IN MILLIONS)
Current	June 2017	\$72.2
1 Year Ago	June 2016	65.7
3 Years Ago	June 2014	69.1
5 Years Ago	June 2012	52.0
Total Investment Return - 1 Year		9.40%
Total Investment Return - 3 Years		2.28%
Total Investment Return - 5 Years		6.04%

\*\*Comprised of commingled funds invested with Chicago PEP, Boston CJEP, Vanguard, and Union Bank overseen by the Foundation Investment Committee. Does not include segregated assets, life insurance policies or charitable remainder trusts.

# DONOR-ADVISED FUNDS

## 2016-2017 Fiscal Year

A Donor-Advised Fund established with the Jewish Federation of Omaha Foundation allows you to support our Jewish community as well as secular charities that are important to you, and can be opened with as little as \$2,500. Donors may recommend distributions of \$100 or more to any qualified 501(c)(3) charity, local or national.

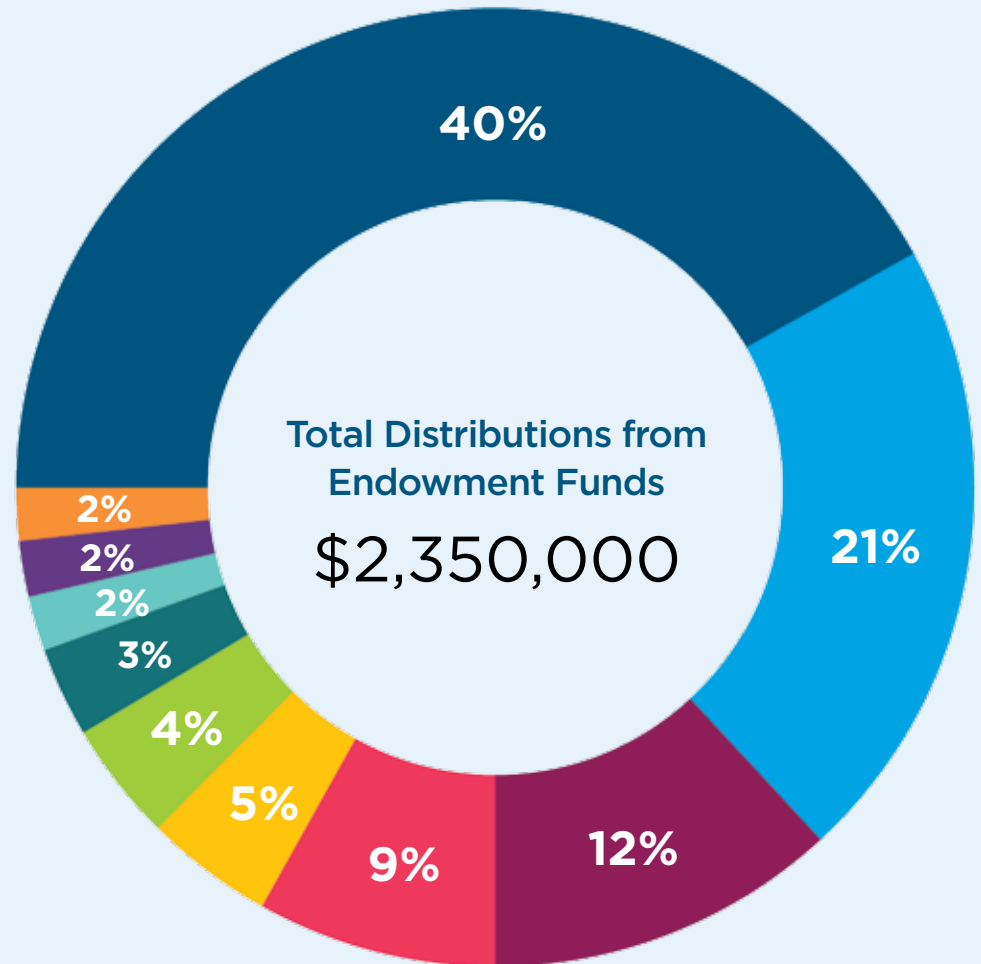


● 27%	<b>Local Secular Organizations</b>	<b>\$731,000</b>	● 7%	<b>Local Jewish Federation Agencies</b>	<b>199,000</b>
● 27%	<b>Local Synagogues</b>	<b>714,000</b>	● 3%	<b>Local Jewish Organizations</b>	<b>84,000</b>
● 22%	<b>JFO Annual Campaign</b>	<b>602,000</b>	● 3%	<b>National Secular Organizations</b>	<b>82,000</b>
● 8%	<b>National Jewish Organizations</b>	<b>204,000</b>	● 3%	<b>Internal Donations to Foundation Funds</b>	<b>75,000</b>

# ENDOWMENT FUNDS 2016-2017 Fiscal Year

An Endowment Fund or a Supporting Foundation established with the Jewish Federation of Omaha Foundation allows you to create a permanent legacy and support the causes within the Jewish community that mean the most to you.

Disbursements from these funds support the Jewish Federation and its agencies, Omaha area synagogues and other local Jewish organizations, such as Friedel Jewish Academy and the Nebraska Jewish Historical Society.



● 40%	<b>Jewish Social Services (RBJH/JSO/JFS)</b>	<b>\$935,000</b>
● 21%	<b>JFO Annual Campaign &amp; Operating Income</b>	<b>494,000</b>
● 12%	<b>JFO Security &amp; Campus Capital Improvements</b>	<b>280,000</b>
● 9%	<b>Scholarships</b>	<b>215,000</b>
● 5%	<b>JFO Agency Programming</b>	<b>120,000</b>

● 4%	<b>Sokolof Scholarships, Awards &amp; Programs</b>	<b>88,000</b>
● 3%	<b>Local Jewish Organizations</b>	<b>70,000</b>
● 2%	<b>ADL &amp; IHE</b>	<b>63,000</b>
● 2%	<b>LIFE &amp; LEGACY Partner Incentives</b>	<b>45,000</b>
● 2%	<b>Other Jewish Organizations &amp; Misc.</b>	<b>40,000</b>

\*Includes distributions from custodial and supporting foundation funds not on balance sheet.



## The Compassionate and Philanthropic Giving of Shirley and Leonard Goldstein



Shirley and Buddy Goldstein  
*Of Blessed Memory*

Shirley and Buddy Goldstein were a compassionate, philanthropic and down-to-earth couple. They were genuinely kind, decent people who were in a position to help others, and never hesitated to do so. Omaha was fortunate to be their home, and each person who knew them was blessed for that experience, as were the countless people who they helped. For many years they generously supported causes dear to them through the Shirley and Leonard Goldstein Supporting Foundation. Shirley and Buddy's commitment and generosity did not end with their passing, however. With thoughtful planning, they took measures to ensure that the same level of support for charities would continue beyond their lifetimes.

To ensure their legacy of giving continues through the Shirley and Leonard Goldstein Supporting Foundation, Shirley and Buddy established a Charitable Remainder Annuity Trust (CRAT) in late 2004. The Goldsteins deposited a substantial amount of money into the trust, and from that time on received semi-annual distributions from the trust. Shirley and Buddy received an income tax deduction, and were able to avoid the hefty capital gains tax. The money from the trust was designated to go to their supporting foundation after the passing of the last survivor. The Jewish Federation of Omaha Foundation was the beneficiary of the trust upon Shirley's death, and deposited the remainder proceeds into the Shirley and Leonard Goldstein Supporting Foundation as a very significant addition to the fund. This altruistic planning further ensures that the Shirley and Leonard Goldstein Supporting Foundation will be awarding grants for a countless number of years to come.

When the Shirley and Leonard Goldstein Supporting Foundation was established in 2003, Shirley and Buddy designated Foundation support for charitable, religious, literary, scientific and educational based



These programs received funding from the Goldstein Supporting Foundation. Top Photo: IHE 2017 Week of Understanding Program Survivors and Liberators. Bottom Photos: 2017 Yom Ha'Atzmaut Celebration.

Jewish Community Center has been helped with programming and events. Foundation funding has helped the CornerStones Scholarship Fund, providing need-based financial assistance for attendance at the CDC preschool, the Friedel Jewish Academy, day camps and summer camps. Jewish Family Service has received funding that enables them to give financial assistance to clients in need. The LIFE & LEGACY program has also benefited from the supporting foundation.

organizations; \$1.3 million has been awarded since that time, making a real difference in the lives of a large and diverse group of people. Grants have been awarded to both Jewish and secular organizations.

Always generous and compassionate, the Goldsteins supported many organizations and causes throughout their lives. With the gift of the balance of their Charitable Remainder Trust, the level of care and generosity shown by the Goldsteins will endure and grow. We are most thankful for Shirley and Buddy's forward thinking and careful planning to ensure their philanthropic goals will continue to be met.

Since the first awards were granted, all Jewish houses of worship in Omaha have received grants for numerous programs, events, and Jewish camp attendance. The Jewish Federation of Omaha has received funds for the community Shaliach, teen trips to Israel, March of the Living, and guest speakers. Jewish Senior Outreach has received funding for the Kosher Meals on Wheels program and older adult case management. The Institute for Holocaust Education has been granted funding for their annual Week of Understanding. Grants have been given to the Nebraska Jewish Historical Society for oral history and educational programs.

The ADL has benefitted with awards for facilitator training. Friedel Jewish Academy has received funding over the years including funding for their fine arts programming, and the Jewish Press has received grants for attendance at national conferences and purchasing a new copier. The





JEWISH



OMAHA



“Showing a commitment to maintaining a strong Omaha Jewish community in the future is of critical importance to me and to David. LIFE & LEGACY is an excellent way to put our words into action.”

JANET KOHLL

# LIFE & LEGACY Program - Coordinator Report 2017



Keynote speaker Amy Hirshberg Lederman and Carl & Zoë Riekes

It has been an exciting year 3 for the LIFE & LEGACY™ program in our community. All of our 9 local partners, Jewish Federation of Omaha and its agencies, ADL/CRC, Institute for Holocaust Education, Nebraska Jewish Historical Society, Chabad House, Friedel Jewish Academy, Temple Israel, Beth El Synagogue and Beth Israel Synagogue have reached or exceeded their individual goals and have received gifts adding up to 590 signed commitments from 305 individual legacy donors with a cumulative estimated value of \$17 million dollars.

Of course, none of this would have been possible without the vision, leadership and support of our JFOF board and generous donors. It is

with gratitude and appreciation that we thank them for their commitment to the Harold Grinspoon Foundation LIFE & LEGACY initiative in Omaha's Jewish community.

This year we hosted our third LIFE&LEGACY community wide celebration event which was attended by 120 guests who were enlightened by Amy Hirshberg Lederman, our keynote speaker, who shared her insights on lighting the torch of philanthropy from generation to generation. We were also honored to have Arlene D. Schiff, LIFE & LEGACY National Director attend as well.

It is a privilege to be a part of this partnership with the Harold Grinspoon Foundation LIFE & LEGACY initiative as we cultivate a culture of legacy giving, foster camaraderie among Jewish organizations and secure the financial future of our amazing Omaha Jewish community.

Very sincerely yours,



*Margo Parsow*  
Margo Parsow  
LIFE & LEGACY Coordinator



LIFE & LEGACY™ is a partnership between the Jewish Federation of Omaha Foundation and the Harold Grinspoon Foundation in collaboration with these participating organizations:



*And its Agencies:*  
Jewish Community Center  
Jewish Press  
Jewish Social Services  
(Jewish Family Service, Jewish Senior Outreach, Rose Blumkin Jewish Home)





Thank you to the members of Omaha's Jewish community  
who have made a LIFE & LEGACY™ commitment.

*Welcome to Jewish Omaha's Legacy Society!*



Marilyn and Steven Tipp with grandchildren

Rabbi Steven & Shira Abraham  
Michael & Sheri Abramson  
Michael Albert  
Anonymous (37)  
Joyce Ashley  
John Atherton & Marti Rosen-Atherton  
Elyce & Aryeh Azriel  
Bob Belgrade  
Sandra Belgrade  
Mark & Jill Belmont  
Harry Berman  
Marilyn F. Berman  
Jake & Susan Besser  
Bonnie Rae Bloch  
Steven R. Bloch  
Becki Brenner  
Beth Brodkey  
Ron Brodkey  
Carrie & Josh Brown  
Elliot Brown  
Michelle Byrnes  
Beth Cohen  
David & Karla Cohen  
Marla & Bob Cohen  
Drs. Michael & Karen Cohen & Family  
Pam Cohn  
Justin Cooper  
Ronald & Cheryl Cooper

Jerry\* & Janey Dann  
Hal & Mary Daub  
Arthur L. Davidson  
Betsy G. Davidson  
Larry & Hanna DeBruin  
Rabbi Ari Dembitzer  
Deborah Denenberg  
Norman & Eunice\* Denenberg  
Steven Denenberg  
Tippi Denenberg  
Pam & Dennis DePorte  
Beth Seldin Dotan  
Eric Dunning  
Toba Cohen-Dunning  
Penny Krasne Endelman  
Harold Epstein  
Howard & Sharon Epstein  
Irving Epstein  
Lisa & Gary Epstein  
Mel Epstein  
Richard Evnen  
James & Judy Farber  
Yonatan & Liz Feldstern  
Richard M. Fellman  
Toby Fellman\*  
Cantor Leo & Annette Fettman  
Glen H. & Hollie Fineman  
Alan J. Fredricks

Jerry Freeman  
Joanne Freeman  
Robyn & Bob Freeman  
Ted & Jamie Friedland  
Bruce & Pam Friedlander  
Amy & Sanford Friedman  
Lloyd D. & Lois N. Friedman Trust  
Lois N. Friedman\*  
Steven M. Friedman  
Lynne Friedel Gellman  
Howard E. Gendelman  
H. Lee & Carol Gendler Charitable Fund  
Donald Gerber  
Dan & Sarah Gilbert  
David Gilinsky & Katherine Finnegan  
Ronald Giller  
Darlene & Sherman\* Golbitz  
Gary & Barbara Goldstein  
Jan Goldstein  
Dora Goldstrom  
Mark Goldstrom  
Alan Goodman\*  
David & Shirley Goodman  
Andie Gordman & Dan Fitzgerald  
Jay & Allison Gordman  
Linda & Jerry Gordman  
Steven Gottlieb  
Andy & Carole Greenberg  
Barton H.\* & Caryl B.\* Greenberg  
Paul G. Greenberg (in loving memory of  
Yvonne, Walter & Brant Greenberg)  
Joshua & Amanda Gurock  
Mendy & Michael Halsted  
Andrea & Marc Hamburg  
M'Lee Hasslinger  
Kathy Goldstein Helm  
Bonnie Kuklin Horwich  
Jon Jabenis  
Randi Friedel Jablin  
Joan Sandler Jacobson  
Richard Jacobson  
Gary & Karen Javitch

Patrick Jensen  
Sylvia Jess\*  
Edward & Anne Joseph & Family  
Debbi Josephson  
Frances Juro  
Richard Juro  
Marcel & Ilse Kahn  
Gary & Sally Kaplan  
Myron Kaplan  
Russ Kaplan  
Beatrice Karp  
Gloria C. Kaslow  
Howard J. Kaslow  
Cookie Katskee  
Julee Katzman  
Jeff & Sharon Kirshenbaum  
Joe Kirshenbaum  
Kevee Kirshenbaum  
Donald S. & Delores Klein  
Marsha A. Kleinberg  
Milton M. Kleinberg  
Sara & Ari Kohen  
David Kohll  
Janet Kohll  
Howard M. & Sharon Kooper  
Shane & David Kotok  
Jack Kozlen  
Alan & Deborah Kricsfeld  
Janie Fox Kulakofsky  
David & Debi Kutler  
Howard & Nancy Kutler  
K. Wayne & Carole A. Lainof  
Randal Langdon  
Sharon Comisar-Langdon  
Barbara Lashinsky  
Joanie Lehr  
Sandy & John Lehr  
Steve & Bonnie Levinger  
Rochelle Lewis  
David Lieberman  
Felicia & Scott Littky  
Mario Lopez

Steve\* & Thelma\* Lustgarten  
Dr. Edward & Sally Malashock  
Jody & Neal Malashock  
Chaya Sarah Malkah  
Dan Marburg  
Joan Krasne Marcus  
Lisa Marcus  
Jon & Denise Meyers  
Sue Meyers  
Tina & Joe Meyers  
Robert Y. Meyerson, M.D.  
Troy & Jamie Meyerson  
Dr. Sidney Mirvish\*  
Stanley & Evelyn Mitchell  
Eli & Ann Modenstein  
Ann Moskovits  
Janie & Allan Murow  
Bruce Muskin  
Mary-Beth Muskin  
Amy Nachman  
Gary Nachman  
Allison Newfeld  
E. R. "Bob" Newman  
Murray & Sharee Newman  
Dr. Patricia Newman  
Phyllis Newman  
Allan S. Noddle  
Patty Nogg  
Steve Nogg  
Susan R. Norton  
Andrea Olson  
Alan S. Parsow  
Carol S. Parsow  
Margo Frohman Parsow  
Vicki Perlmeter  
Bonnie Pfrenger  
Eric & Julie Phillips  
Gilda Pieck  
Marcia & Steve Pitlor  
James & Susan Polack  
Alan E. Potash  
Bruce Potash

Linda Neumann-Potash  
 Paul Rabinovitz  
 David & Gretchen Radler  
 Mary & Joel Rich  
 Philip & Diane Rich  
 Marty & Iris Ricks  
 Ari Riekas  
 Carl Riekas  
 Margo Riekas  
 Steven J. Riekas  
 Zoë Riekas  
 Bob Rifkin  
 Jane & Harlan Rips  
 Jonathan Rockman  
 Stacey Rockman  
 Silvia G. Roffman  
 Debbie & Lloyd Roitstein  
 Susan Rothholz  
 Lynne-Carol Saltzman  
 Rosalie & Milton\* Saylan  
 Caryn & Marc Scheer  
 Carol\* & Ed Schneider  
 Jeffrey Schrager & Anne York  
 Family Foundation  
 Jeff Schweid  
 Aviva Segall & Patrick McNamara  
 Ted & Sarah Seldin  
 Mr. and Mrs. Ben Shapiro  
 Nate A. Shapiro  
 Sherry & Larry Shapiro  
 Len Burrell & Cantor Wendy Shermet  
 Aveva & Martin Shukert  
 Gary Shyken  
 Liat Shyken  
 Paul Shyken  
 Susann Shyken  
 Michael & Andrea Siegel  
 Esther Silver  
 Stanley\* & Norma\* Silverman  
 Tootie Simon  
 Gerald & Judy Simons  
 Nancy B. Skid  
 Janet & Jerry Slusky  
 Michael Staenberg  
 Carolyn "Rocky" Stern  
 David Keiser & Lillian Keiser  
 Stoms Foundation  
 Louri Sullivan  
 Barry H. Summer  
 Fred Tichauer  
 Marilyn & Steven Tipp



Pam Friedlander & Gloria Kaslow

Basya Tsed  
 R. Thomas Vann  
 Irving & Gail Veitzer  
 Norman & Joodi\* Veitzer  
 John & Donna Walter  
 Jim & Esther\* Wax  
 Aaron Weiner & Therese Vaughn  
 Harry M. Weiner  
 Kathy Weiner  
 Rabbi Yaakov & Ilana Weiss  
 Benjamin & Anna Wiesman Family  
 Susan Fellman Witkowski  
 Nancy L. Wolf  
 Robert Yaffe  
 Anna Yuz-Mosenkis  
 Renee & Jeff Zacharia  
 Steve & Kathy Zalkin  
 Charlotte & Morley Zipursky  
 Sally & Jim Zipursky  
 Deborah & Speedy (Dr. Eugene) Zweiback  
 Rosie Zweiback & Mace Hack

Names as of December 15, 2017

\*Of Blessed Memory

***This is the year to establish  
 your Legacy.***

**Contact the Jewish Federation  
 of Omaha Foundation today!**

**Howard N. Epstein**  
 Executive Director  
 402-334-6466  
 hepstein@jewishomaha.org

**Margo Parsow**  
 LIFE & LEGACY Coordinator  
 402-334-6432  
 mparsow@jewishomaha.org

## In Memoriam - Sheila Rosen -

It is with great sadness that the Jewish Federation of Omaha Foundation notes the passing of Sheila Rosen in June of this year. Sheila was the widow of the Foundation's first director, Jerry Rosen, and a beloved friend of the Foundation. Sheila moved to the San Diego area from Arizona over seven years ago, but kept in contact with her many friends in Omaha. In 1993, the Jerold I. and Sheila E. Rosen



Sheila Rosen  
*Of Blessed Memory*

Endowment Fund was established by a provision in Jerry's will. The purpose of the fund is to provide university and college scholarships for Jewish students in the metropolitan area who have a financial need. Since its establishment, the fund has helped many Jewish students attend the college or university of their choice. Sheila lived a life of strength, kindness, love of family and friends and concern for all. Sheila was engaged in life and kept busy with activities available in her community. She is survived by her son, Steve, and his wife Sara, four grandchildren, one great grandchild, brother-in-law Bob Baker, and nephews. Sheila will be greatly missed by her family, friends and the Foundation staff.

# Anti-Bigotry Endowment, A Loving and Lasting Tribute to Jule M. Newman



Jule M. Newman  
*Of Blessed Memory*

Jule Newman had what most would consider an impossible dream. As he told his young bride-to-be, Esther Kaplan, he would someday own a chain of grocery stores. And, with hard work, long hours, determination, and knowledge learned from working in his father's small grocery store, he did just that.

Jule's parents immigrated to Omaha from a small village near Budapest, Hungary (then Austria-Hungary). During his earliest years, he worked at his father's small grocery. Although not mandatory in those years, he still attended public school through the eighth grade. High school was not an option for children of poor immigrant families in the first decade of the 20th century.

From this beginning, building a chain of extremely successful supermarkets would be unusual and extraordinary for anyone. After serving in the Medical Corps in World War I, he worked in the shops department of the Union Pacific Railroad. After he had saved \$1,100, enough seed money for a store in those years, he still almost gave up his dream. He had been offered the job of managing the railroad's entire shop operation, evidence of his rare qualities. With his savings, Jule and a partner opened a grocery store in

1920. Just three years later, he bought out his partner, and started to build a chain of grocery stores with his two brothers and a cousin. The grocery store chain, known as Hinky Dinky, grew to 49 supermarkets in Nebraska, Iowa, Kansas and Missouri. Jule's vision for his stores was innovative and progressive, helping to develop the modern grocery stores as we know them today.

As a loving and lasting tribute to their father, Bob, Jim and Murray Newman have honored his memory by establishing the Jule M. Newman Anti-Bigotry Endowment Fund at the Jewish Federation of Omaha Foundation. The fund will sponsor specific programming designed and conducted by the Anti-Defamation League Plains States Regional office.

Knowing that their father respected the mission of the ADL, Bob, Jim and Murray chose that organization as the beneficiary of the new fund. Jule had a strong interest in law enforcement; therefore, the fund will ensure that anti-bias training for law enforcement officers is presented annually. A second priority for the fund will be for programming focusing on the prevention of hate, bigotry and anti-Semitism.

Jule Newman led a long, productive, and engaged life. He is a man who deserves to be remembered for his community involvement and concern for others. His generous spirit will live on through the Jule M. Newman Anti-Bigotry Endowment Fund.

# Jewish Press Receives a Vote of Confidence with Inspiring Gift from Newspaper Visionary Stanford Lipsey



Stanford Lipsey  
*Of Blessed Memory*

**T**hroughout his life, Stanford Lipsey described himself as, “just a little kid from Omaha.” In fact, he was an award-winning publisher, community leader, photographer, philanthropist, and visionary. He was a husband, first to the former Jeanne Blacker of Omaha, and then Judi Hojnacki of Buffalo, NY; father to Janet and

Daniel, and grandfather to two grandsons. He was referred to as the most powerful man in western New York, a friend to governors and senators.

Stan served in the Air Force during the Korean War, and was the editor of the base newspaper at Strategic Air Command Headquarters at Offutt AFB. When his military service was over, Stan worked for The Sun Newspapers. He earned the position of publisher as the company grew. Stan immersed himself in the Omaha community through civic leadership and was a supporter of the Omaha Jewish Federation. He also served on the board of the Jewish Press.

In 1968, Stan sold The Sun Newspapers to Warren Buffett. When Warren

purchased The Buffalo Evening News, he asked Stan to head it up. During Stan’s career at The News, it became the highest circulation newspaper in the country, and the most profitable per capita.

While Stan may have left Omaha, Omaha never left Stan. Over 20 years ago, he established a Charitable Remainder Trust, and on his death in California in 2016, the proceeds were paid to the Jewish Federation of Omaha, for the benefit of The Jewish Press. The Foundation used the funds to establish the Stanford Lipsey Jewish Press Endowment Fund. This newly created endowment fund will be used for the operations and activities of the Jewish Press. “Stan Lipsey’s generosity is humbling and inspiring. There are not as many Jewish papers as there once were; for him to give the Jewish Press and the community this gift is truly a vote of confidence,” stated Annette van de Kamp, editor of the Jewish Press.

Stan was a philanthropist with a variety of interests, which were wide-ranging, and reflected a man of many interests, talents, and causes dear to his heart. He was an exceptionally generous man during his lifetime, and his after lifetime gift will continue the legacy of giving that was such a major part of who the man was. The Jewish Federation of Omaha Foundation is profoundly grateful for Stan’s charitable planning for the future of the Jewish Press.



# Creating a Legacy

These charitable planning tools can help you manage your philanthropy in a way that complements your overall tax planning, as you choose to make your contribution either during your lifetime or through your estate.

## Donor-Advised Fund

Simply put, a Donor-Advised Fund is a personal charitable tool that helps you organize your charitable giving in one account. You establish a fund with the Foundation by completing a simple agreement and contributing a minimum of \$2,500. You contribute cash or publicly traded securities to your fund at any time. You receive an income tax deduction in the year of the gift, though distributions from the fund need not occur in the same year. The Foundation invests your Donor-Advised Fund assets; income is reinvested and grows tax-free. You recommend distributions of a minimum of \$100 from your Donor-Advised Fund to any IRS qualified 501(c)(3) charity, either Jewish or secular, and the Foundation takes care of the details.

## PACE/LOJE Funds

Perpetual Annual Campaign Endowment (PACE) and Lion of Judah Endowment (LOJE) Funds are separate endowments you create at the Foundation, the income from which will make an annual campaign gift in your name well after your lifetime. The funds are intended to provide a gift in your name to the Federation Annual Campaign in perpetuity. The endowment may be funded either during your lifetime or as part of your estate, with potential significant tax benefits in either case. PACE and LOJE are opportunities to make an impact on the Federation and our Jewish community for many years to come.

## Supporting Foundation

A Supporting Foundation is a separate legal entity (with a separate board) created by you and your family. This entity enters into a relationship with the Foundation whereby the Foundation manages and invests the funds, administers operations and makes disbursements as directed from time to time by the Supporting Foundation Board.

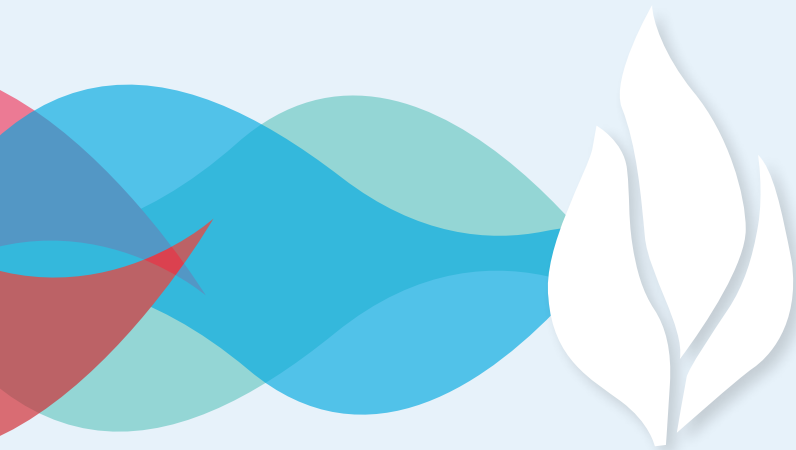
## Endowment Fund

Establishing an Endowment Fund at the Foundation allows you to create a permanent legacy and support the causes within the Jewish community that mean the most to you. An Endowment Fund is created by contributing a minimum of \$10,000. You complete a simple agreement, and then fund your endowment by contributing cash, appreciated securities, a life insurance policy with the Foundation as the beneficiary, by transferring assets from a qualified retirement plan naming the Foundation as a beneficiary or through other means. The Foundation invests your Endowment Fund assets; income is reinvested and grows tax-free. Endowment Funds may be unrestricted or restricted. The Endowment Fund will begin annually providing income for the Jewish purpose you select one year after the fund has been established and every year thereafter in perpetuity.

- Unrestricted Endowment Fund- Annual income is disbursed directly to the Federation for its unrestricted general use.
- Restricted Endowment Fund - Annual income is designated for the purpose you choose. It may support any agency or program on campus.

## Charitable Remainder Trust

You create a separate trust which generally provides lifetime income to you and/or your spouse. A determined percentage of the funds contributed to the trust is tax deductible. A corporate trustee holds, invests and distributes the funds during your lifetime. After your passing, the remainder is distributed for the benefit of the Federation and/or its agencies according to your wishes. You determine the purpose.





Janet Henthorn, Margo Parsow, Howard N. Epstein, Laurie Peatrowsky, and Linda Pollard

## We hope you'll take advantage of the different ways to keep in touch with the Foundation:

- **Website** - Visit our website ([www.jfofoundation.org](http://www.jfofoundation.org)) to learn more about the Foundation, our community, and establishing charitable funds that support Omaha's Jewish community. Get valuable tips for your financial advisors and yourself.
- **Facebook** - "Like" us on Facebook (JFOF1) to see photos of events supported by our funds and much more.
- **Twitter** - Follow us on Twitter ([jfofoundation](https://twitter.com/jfofoundation)) to quickly get the latest Foundation news and updates.
- **eNewsletter** - Get the latest news about our funds, donors, programs and philanthropic activities, and charitable giving news from Washington and the IRS. Contact us to subscribe to this free monthly service.
- **Phone and Email** - You are always welcome to call, send an email message or stop by our office!

## We hope you enjoy the 2017 Annual Report of the Jewish Federation of Omaha Foundation.

If you would like additional information on how you can join the Foundation family and create a legacy for our community, please contact:

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*It's more than a donation. It's your legacy.*