



Jewish Federation of Omaha

Foundation

*L'Chaim. **יה** To Life!*

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*Celebrating 36 Years, Supporting Jewish Omaha*

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2020 ANNUAL REPORT

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# L'Chaim. To Life!

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## TABLE OF CONTENTS

Message from the President.....	3
Message from the Executive Director.....	4
Staff Retirement.....	5
Wiesman Family.....	6-7
COVID Relief Fund.....	8
Endowment and Custodial Funds.....	9-15
Gifts that Mature in the Future.....	15
In Memory of 2019-2020 Donors.....	15
PACE/LOJE.....	16
In Memoriam.....	17
Sandy & Stuart Kuler.....	18-19
Financial Overview.....	20-23
Anne & Arthur Grossman.....	24-25
Omaha Jewish Alumni Association.....	26
LIFE & LEGACY™ Program.....	27-29
Creating a Legacy.....	30
Foundation Staff.....	31
Board of Directors.....	32



Jewish Federation of Omaha  
**Foundation**

**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.**

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.

## A MESSAGE FROM THE PRESIDENT

I'd have to say that my first year as President of the Jewish Federation of Omaha Foundation was far from what I, or anyone else, expected. What began as a relatively uneventful year, quickly melded into one like no other. COVID-19 didn't simply change our lives, it tore deeply into our community. I keep thinking of this paradoxical passage from one of the great literary masterpieces:

*"It was the best of times, it was the worst of times..."*

Charles Dickens' words ring true even today. Many of us adapted quite well to the "new normal" while others found themselves unemployed, sick and unable to work. Since beginning my term, I've had the opportunity to preside over just 2 physical board meetings, the balance via Zoom as we have all become accustomed to meeting. Relatively speaking, this has been no great hardship for us. However, I do want to commend the Foundation staff as well as our Board for stepping up and leaning into the challenges put before us. We haven't missed a beat and great work continues to be done day-in and day-out.

In particular, it's a pleasure to have the opportunity to work with our Executive Director, Howard Epstein. His tireless dedication to the mission along with his professional drive to improve the organization makes for a rewarding partnership.

It's important to note that we achieved our long-term goal of capital preservation through one of the most volatile economic

conditions in modern history. With a steady hand on the wheel and a consistent long term investment strategy, our organization not only preserved capital assets, but grew them by 2.23% year-over-year.

This placed us in excellent position to help start a COVID-19 Emergency Relief Fund to provide assistance to those succumbing to financial hardship due to the pandemic. COVID has certainly hit some people much harder than others and the needs were great in our community. And, amidst the chaos created by the pandemic and the additional demands placed upon the Foundation, we were still able to distribute more than \$6,000,000 for the benefit of our community.

Thank you to each of you who continue to support the Foundation and its mission. It's a privilege to lead such an important and impactful organization in our Jewish community. Here's to a more predictable and healthier year!

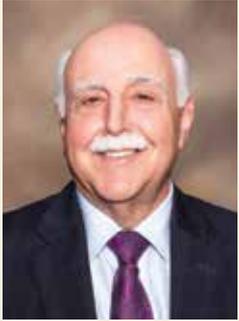


David Gilinsky

A handwritten signature in black ink, appearing to read 'David Gilinsky'.

David Gilinsky  
Board President

## A MESSAGE FROM THE EXECUTIVE DIRECTOR



Howard Epstein

In 1983, the Jewish Federation of Omaha Foundation was established with a mission to help assure the stability and continuity of Jewish life in the Omaha area. How fitting it is that during the fiscal year just ended, the Foundation proudly celebrated its 36th year, our “Double Chai” year. Chai is Hebrew for the number 18, and translated to English, Chai also means ‘life,’ and represents being alive.

During a fiscal year marred by the COVID-19 pandemic, political divisiveness, and intense civil unrest, I am pleased to report that the Foundation’s endowments, donor-advised funds, and supporting foundations continued to provide much needed financial resources so vital to Omaha’s Jewish communal life.

Early in the pandemic, the Foundation provided seed money to jump start the Omaha Jewish community’s COVID-19 Emergency Relief Fund. Coupled with generous donations from a broad spectrum of the community and hard work of Jewish Family Service and Jewish Senior Outreach staff, Jewish families and Federation employees who suffered financial hardship because of COVID received much needed assistance, and when requested, counseling for mental health issues stemming from the pandemic.

Despite the pandemic and the financial and economic rollercoaster in its wake, the Foundation’s assets under management grew to over \$98 million. And of great significance, the Foundation distributed over \$6.2 million to benefit the community during this past fiscal year.

You, our generous donors, are the key to the Foundation’s growth and success. Through endowments, donor-advised funds, supporting foundations, and LIFE & LEGACY™ gifts and commitments, you make it all possible, and we thank you.

The Foundation Board of Directors plays a pivotal role in the success of the Foundation. Led by our board president, David Gilinsky, they provide guidance and oversight for the investments, marketing, development and direction of the Foundation. Sincere thanks go to all of them as they work to better Omaha’s Jewish community. Special recognition goes to

Gloria Kaslow, who stepped down after seven years on the board. I can always count on Gloria for sage advice and the perspective of a long-time dedicated volunteer and supporter.

I sincerely thank David Gilinsky, who completed his first year as the Foundation’s board president, for his dedication and commitment to the Foundation. David has shown great leadership, and it has been my pleasure to work closely with him. I appreciate David’s advice, perspective and willingness to talk through Foundation matters at any time.

Two valued members of the Foundation staff retired this year. After almost 16 years, Operations Manager Janet Henthorn retired to spend more time with her family and to pursue other interests. Margo Parsow retired after six years as Coordinator of LIFE & LEGACY and the Omaha Jewish Alumni Association. Janet and Margo made a lasting impact on Jewish life in Omaha. We will truly miss them and wish them all the best.

We are pleased to have promoted Laurie Peatrowsky to the position of Operations Manager. Laurie has been with the Foundation for over 20 years. She is familiar with all our donors and supporters, works tirelessly and with much enthusiasm, and knows most every aspect of the Foundation’s operations. She has taken on her new role with her trademark smile and with gusto.

We welcome Diane Walker and Jay Katelman to the Foundation. Diane has taken the position of Foundation Fund and Scholarship Administrator, and Jay is our new LIFE & LEGACY and Omaha Jewish Alumni Association Coordinator. Jay and Diane are enthusiastic and eager to help the Foundation grow and prosper.

Thanks also to Linda Pollard, Endowment Assistant and Staff Writer, who so willingly and cordially assists in day-to-day Foundation matters and is the “go to” person for Jewish Press articles.

L’Chaim!

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

Howard N. Epstein  
Executive Director

*You will be missed!*

## CONGRATULATIONS TO JANET HENTHORN AND MARGO PARSOW ON THEIR WELL-DESERVED RETIREMENT!



**Janet Henthorn** retired from her position as Operations Manager effective August 1st. For nearly 16 years, Janet dedicated her financial expertise to the Foundation. Janet worked closely with the Foundation Investment Committee where she applied her financial skills in managing banking, analyzing financial records, preparing financial reports and completing tax returns for supporting foundations. Janet is familiar with all endowment and donor-advised funds, knowing the purpose for each endowment fund. She coordinated with the Sokolof and Hornstein committees to help ensure the awarding of scholarships and awards with great skill over the years. Her knowledge in all areas of the Foundation contributed to its success and growth.

Howard Epstein stated, “Janet is one of the smartest people I know, and I will always value her insight and perspective, her advice, and especially her friendship. She steered me and others in the Foundation office in the right direction more times than I can count. All of us on the Foundation staff, the Foundation board, our donors and supporters, and most everyone across the entire Federation campus had the good fortune to work with Janet these many years. We wish her all the best in her retirement.”

Janet’s husband, Steve, is a retired Omaha Police detective. She has three grown children, Melissa, Elizabeth and John. Melissa lives in Minneapolis with her children. Elizabeth and her husband, Josh, and Janet’s son John live in Omaha. Janet looks forward to being able to spend more time with her grandchildren, traveling when it is safe, and volunteering. She is active in her church and sings in the choir. She is an avid reader and book club member. Not one to push back in a recliner in her retirement, Janet will most certainly keep busy. We are just sorry that it’s not at the office. Howard echoed the entire Foundation staff’s feelings saying, “Janet is a stellar person, and we are going to miss her.”



After six years at the Foundation, **Margo Parsow** retired from her position as Coordinator of LIFE & LEGACY™ and Omaha Jewish Alumni Association in June. Margo worked with all the LIFE & LEGACY partners, holding training sessions and helping the partners with all aspects of meeting their goals. She worked closely with the Harold Grinspoon Foundation National LIFE & LEGACY program, making connections with other LIFE & LEGACY coordinators and attending national conventions. Margo planned and coordinated a yearly LIFE & LEGACY celebration for the partners and community members who have signed letters of commitments, including a program with guest speakers. Under Margo’s leadership, the LIFE & LEGACY program has grown beyond expectations.

At the 2018 LIFE & LEGACY/Create a Jewish Legacy Leadership Gathering in Springfield, Massachusetts, hosted by the Harold Grinspoon Foundation, Margo received the 2018 Gail Littman Leadership Award. Howard Epstein said, “Margo inspired all of us during her six years at the Foundation. She led the effort to build Omaha’s LIFE & LEGACY initiative, building it from a fledgling program to one that is nationally recognized. Having had the pleasure of working with Margo over the past six years, I have witnessed first-hand her enthusiasm for this work and her commitment to insuring the future of the Omaha Jewish community. And she was there at the start of the Omaha Jewish Alumni Association. OJAA now has a strong base upon which to build, and whenever Omahans and former Omahans connect, we will all remember that Margo helped the program in its infancy.”



Margo’s grown sons live out of state. Aaron lives in New York and Charles lives in Boston. Her mother, Barbara Frohman, lives in Omaha. In her retirement, Margo has plans for her next project. Whatever that project is, we are confident that it will be as special as Margo and very successful.

## WIESMAN FAMILY

# *Continues to Generously "Give Back"*



Anna & Benjamin Wiesman

For many years the **Benjamin and Anna Wiesman** family has had a strong connection to the Jewish community. Throughout the years, the Wiesmans have supported both local and national Jewish organizations. Anna, of blessed memory, and Ben were both deeply involved with organizations through volunteerism and community service in the Jewish community, as well as the secular community. In continuation of this tradition, Ben and his sons David, William, Mark, and Stephen donated funds for the Benjamin and Anna E. Wiesman Family Reception Room at the Learning Commons in the Jewish Community Center. "Our decision to support the renovation and upkeep of the JCC is in keeping with this history," said Mark Wiesman.

The Benjamin and Anna E. Wiesman Family Foundation also established the Benjamin and Anna E. Wiesman Family Reception Room Maintenance Endowment Fund at the Jewish Federation of Omaha Foundation. The purpose of this fund is to pay for costs of cleaning, maintenance, repairs and upkeep of the Benjamin and Anna E. Wiesman Family Reception Room at the Learning Commons at the Jewish Community Center. Mark said, "We feel that maintenance and operation funding is often overlooked in capital projects such as this, therefore we have contributed to an endowment to maintain the building."

Steve Levinger, Chief Development Officer of the Jewish Federation of Omaha, said, "Thanks to the generosity of Ben Wiesman and Anna Wiesman, of blessed memory, along with their sons, David, William, Mark, and Stephen, this reception room will provide our community with a space for learning and for hosting a variety of diverse programming. We are grateful for the Wiesman family's gift to the project which also includes an endowment provision to ensure this space will be well maintained for years to come."

While the establishment of this fund was a Wiesman family decision, Mark said that his father, "was very interested in supporting the JCC, and the Federation." Although the JCC has been open to all of Omaha, David is hopeful that the new reception room will become even more utilized by all members of the metropolitan Omaha community. Mark feels the inclusion of all Omaha area citizens promotes understanding and helps to reduce prejudice. Mark said, "Our family has benefited from the various programs that the Federation and JCC have offered over the years, and we feel that it is right that we should "give back" to them."



Benjamin and Anna E. Wiesman Family Reception Room - Opening 2021

Yachad members at the zoo.

## COVID-19 Emergency Relief Fund

The COVID-19 Emergency Relief Fund was established to provide immediate assistance to the Metro Omaha Jewish community. The Jewish community stepped up and generously donated to help those in need. As of October 30, 2020, 138 requests for assistance have been completed by Jewish Family Service.

Funds have been distributed to community members and Jewish Federation employees for the following:

- Counseling sessions for COVID-19 related issues
- Tuition assistance for Jewish families for Jewish education
- Meals delivered by Jewish Senior Outreach
- Medical expenses
- Groceries
- Rent and mortgage payments
- Utility bills
- Car expenses

**The COVID-19 Emergency Relief Fund remains an ongoing initiative. To request assistance or to make a donation, please call the JFS main line at 402-330-2024.**



# 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
- **Goldstein** Family Jewish Press 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
- Phyllis H. and E. Robert **Newman** Endowment
- Morton A. **Richards** Endowment
- Dorothy L. and Max **Riekes** Endowment
- Ted and Dorothy **Blacker Rothkop** Endowment

- Beverly K. and Millard R. **Seldin** Endowment
- Phyllis and Irvin **Sherman** Family Endowment
- Judith A. and Gerald B. **Simons** Endowment
- Maxine and Milton **Simons** Endowment
- **Staenberg** Federation Endowment
- Dr. Charles and Mary Ann **Taylor** LIFE & LEGACY 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 Press Centennial Fund

## JEWISH SOCIAL SERVICES

### JEWISH FAMILY SERVICE

- Beatrice **Karp** LIFE & LEGACY Fund for 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
- Ike and Roz **Friedman** Foundation JCC Preschool Playground Equipment Fund
- 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
- Bucky **Greenberg** Aquatic Endowment
- Harvey and Marcia **Lipsman** JCC Youth Endowment
- Trenton B. **Magid** Fund
- 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

## JEWISH SOCIAL SERVICES

### 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
- Ed and Sally **Malashock** Jewish Senior Outreach Fund
- Bettie and Stuart **Muskin** JSS Endowment
- Al and Vivian **Oruch** Memorial Fund
- Ruth **Riekes Richards** Memorial Fund
- Ervin and Miriam **Simon** Endowment



## JEWISH SOCIAL SERVICES

### ROSE BLUMKIN JEWISH HOME

- Sheldon A. and Lorrie **Bernstein** Endowment
- Rose **Blumkin** Fund
- Bruce H. **Brodkey** & Marcia A. **Hoffman** Endowment Fund
- David and Helen **Brodkey** Endowment for RBJH
- 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** RBJH Endowment
- Betty **Marx** Activities Endowment

- **Meyers** Family Legacy of Laughter Endowment
- Leo I. and Helen P. **Meyerson** RBJH Endowment
- Dan **Miller** Endowment
- Dr. Daniel and Harriet **Miller** Memorial Endowment
- **Parsow** Family Endowment
- Janet S. and Stanley E. **Perlmeier** Memorial Courtyard Maintenance Fund
- Shelly **Nogg Pichik** Field Trip Fund
- David S. **Rice** and Esther **Zorinsky Rice** Endowment for RBJH
- 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 RBJH Activities Endowment
- Helen and David **Shukert** L.O.V.E. Scholarship Fund
- Norma and Stanley **Silverman** Endowment
- Irvin and Suzanne **Richards Singer** Endowment
- Marion and Dave **Wine** Endowment
- Janet **Wintroub** Sing-A-Long Fund
- Sara Rose **Woskoff** Arts and Crafts Resource Fund
- Religious Programming Fund
- Rose Blumkin Jewish Home Medicaid Supplement Fund

### 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
- Jennifer Beth **Kay** Memorial Fund
- 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
- **Perlmeier** Family Jewish Family Service Assistance Fund
- Ruth and Bernard **Raskin** Endowment
- Leo and Frances **Rodick** Memorial Endowment
- Craig **Saylan** 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
- Robert **Sturm** JFS Housing Assistance Endowment
- Jake and Mary **Wine** Fund
- Yachad Endowment



# 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
- Sandra **Belgrade** Memorial Professional Development 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
- **Glazer** Family Charitable Fund
- 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
- 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
- Jacob **Friedman** and Betty **Tarnoff Friedman** College Scholarship Endowment
- Rebecca **Friedman** Scholarship Fund
- Carl L. **Frohm** Educational Custodial Fund
- Randy and Marvin **Gilman** Scholarship Fund
- Ann **Goldstein** Education Programming Endowment Fund
- Gary and Barbara **Goldstein** Jewish Youth Camp 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
- Ann & Arthur **Grossman** 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
- Stanley & Barbara **Malashock** Camp Scholarship Endowment 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
- Carl & Zoë **Riekes** Scholarship Endowment 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
- Edward **Zorinsky** Endowment
- Ahava Dan Jewish Community Engagement Fund
- CornerStones Fund
- Passport to Israel Program Fund

#### ESTABLISHED FUNDS DESIGNATED FOR THE JEWISH FEDERATION ANNUAL CAMPAIGN

- Norman B. and Frances P. **Batt** PACE Fund
- Sandra **Belgrade** LOJE Fund
- Herbert M. **Berkowitz** Memorial PACE Fund
- Dr. Mark **Brodkey** PACE Fund
- Leo and Aileen **Eisenstatt** PACE/LOJE Fund
- Ted and Jamie **Friedland** PACE Fund
- Roz **Friedman** and Susan **Friedman Cohn** LOJE Fund
- Thama Lee **Friedman** PACE Fund
- Ned N. and Pearl R. **Giventer** PACE/LOJE Fund
- **Glazer** Family Charitable Fund
- Ann **Goldstein** LOJE Fund
- Kathy **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
- Janice **Schneiderman** LOJE Fund
- 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

#### ESTABLISHED FUNDS DESIGNATED FOR THE ONGOING MAINTENANCE OF FEDERATION FACILITIES

- Susie and Mike **Norton** Federation Campus Maintenance Endowment Fund
- **Riekes** Family Federation Campus Maintenance Endowment Fund
- Benjamin and Anna E. **Wiesman** Family Reception Room Maintenance Endowment 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 10 partners (see pages 28-29 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
- Jody and Neal **Malashock** Endowment
- Bruce **Meyers** LIFE & LEGACY Endowment
- Robert and Betty **Perelman** Endowment for the Federation
- Vicki **Perlmeter** LIFE & LEGACY Endowment
- Denise **Silverman** LIFE & LEGACY Endowment
- Stanley and Norma **Silverman** 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. and Harriet B. **Singer** Memorial Fund for Youth
- Phil and Ruth **Sokolof** Honor Roll Fund
- Special Donor-Advised Fund

## JEWISH FEDERATION OF OMAHA

### 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

- Arthur L. and Betsy **Davidson** Emergency Assistance Endowment Fund for 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
- Stuart and Sandy **Kutler** Omaha BBYO Leadership Development & Programming Excellence Endowment
- Carol and Edward **Schneider** Legacy Endowment for the Jewish Federation of Omaha



## SUPPORT FOR PARTNERS / AFFILIATES / OTHER ORGANIZATIONS

### ANTI-DEFAMATION LEAGUE - COMMUNITY RELATIONS COMMITTEE

- Barton (Bucky) **Greenberg** and Caryl **Greenberg** ADL-CRC Memorial No Place for Hate® Scholarship Fund
- Beatrice **Karp** LIFE & LEGACY Fund for the ADL-CRC
- Jule M. **Newman** Memorial Anti-Bigotry Endowment
- ADL LIFE & LEGACY Endowment

### BETH EL SYNAGOGUE

- Sandra **Belgrade** Memorial Professional Development Endowment
- Beatrice **Karp** LIFE & LEGACY Fund for 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

### B'NAI ISRAEL SYNAGOGUE (Council Bluffs, IA)

- **Goldstein** Family Endowment for B'nai Israel Synagogue

### CHABAD LUBAVITCH OF NEBRASKA

- Ann **Cohen** Memorial Chabad Education Fund
- **Goldstein** Family Endowment for Chabad Lubavitch of Nebraska

- Forrest Nathan and Lisa **Stewart Krutter** Endowment
- Chabad Second Rabbi's Endowment
- Chabad LIFE & LEGACY Endowment

### FRIEDEL JEWISH ACADEMY

- **Cohen** Family Endowment in Honor of Denise Bennett
- Nathan and Rose Lillian **Fine** Endowed Teacher of the Friedel Jewish Academy
- Leonard L. and Phyllis J. **Friedel** Family Endowment
- **Goldstein** Family Friedel Jewish Academy Endowment
- Roxann **Lebowich Lavorato** Memorial Endowment
- Eli and Rose **Schupack** Library Endowment
- Emergency Assistance Fund for Friedel Jewish Academy
- Friedel Future Fund

### INSTITUTE FOR HOLOCAUST EDUCATION

- Beatrice **Karp** LIFE & LEGACY Fund for IHE
- Paula and Vince **Lenz** Endowment for IHE
- **Lieberman** Family of Scottsbluff, Nebraska LIFE & LEGACY Endowment Fund for Holocaust Education
- Institute for Holocaust Education LIFE & LEGACY Endowment



#### JEWISH FEDERATION OF LINCOLN

- Jewish Federation of Lincoln Custodial Fund

#### NEBRASKA JEWISH HISTORICAL SOCIETY

- Bob **Belgrade** NJHS Endowment
- **Goldstein** Family 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. **Staenberg** Family NJHS Oral History Project Endowment
- NJHS - 5th Commandment Sustaining Fund
- Nebraska Jewish Historical Society Custodial Fund
- Nebraska Jewish Historical Society LIFE & LEGACY Endowment

#### TEMPLE ISRAEL

- Temple Israel LIFE & LEGACY Endowment

## GIFTS THAT MATURE IN THE FUTURE

### Charitable Remainder Trusts:

Morton A. Ives  
 Murray H. Newman  
 Ruth E. Raskin  
 Jeanne Lipsey Rosenblum

## IN MEMORY OF OUR FOUNDATION DONORS WHO PASSED AWAY IN 2019-2020 (July 1, 2019 - June 30, 2020)

### Arthur L. Davidson

Arthur and Betsy Davidson LIFE & LEGACY Endowment Fund

Arthur L. and Betsy Davidson Emergency Assistance Endowment Fund for Jewish Federation of Omaha

### Albert Feldman

Albert and Eleanor Feldman Family Israel Foundation

### Marian Gelfand

Harvey and Marcia Lipsman JCC Youth Endowment

### Marilyn T. Kaplan

Marilyn T. Kaplan Fund

### Louise Lippett

Lippett Family Endowment Fund

### Sue Meyers

David J. and Sue Meyers Jewish Experience Scholarship Endowment Fund

### Rose Schupack

Eli and Rose Schupack Library Endowment Fund

### Millard Seldin

Beverly K. and Millard R. Seldin Endowment

### LIFE & LEGACY

### Elyce Azriel

### Michelle Byrnes

### Arthur L. Davidson

### Joanne Freeman

### Gary Kaplan

### Sue Meyers

### Ann Moskovits

### Susan Rothholz

### Charlotte Zipursky



Carl and Zoë Riekes, Brett and Stacey Atlas



Dr. Joel and Nancy Schlessinger

## 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:

Sandra Belgrade*	Pearl Richman Giventer*	Patty Nogg	Janice Schneiderman
Carol Bloch	Ann Goldstein*	Dorothy (Mrs. Henry) Riekes*	Beth Schragger
Susan Cohn	Kathy Goldstein	Zoë Riekes	Terri Schragger
Aileen Eisenstatt*	Shirley Goldstein*	Kimberly Robinson	Cari Sommer*
Lisa Epstein	Sally G. Malashock*	Stacey Rockman	Joodi Veitzer*
Sandy Epstein	Sharee Newman	Nancy Schlessinger	
Roz Friedman*	Nancy Noddle		

## 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 Alperson	Ted & Jamie Friedland	Kenneth M. ("Kip") & Bridget M. Gordman	Edward M. Malashock	Martin Ricks	Phillip Schragger*
Norman & Frances Batt*	Thama Lee Friedman*	Andrea & Marc Hamburg	Joe & Tina Meyers	Carl Riekes	Lorraine Silverman*
Herbert M. Berkowitz*	Ned N. Giventer*	Marcel & Ilse* Kahn	Sidney Mirvish*	Henry Riekes*	Janet and Jerry Slusky
Steven Bloch	Glazer Family Charitable Fund	Marilyn T. Kaplan*	Allan & Janie Murow	Debra L. Rifkin	Phil Sokolof*
Mark Brodkey	Donald Goldstein	Howard & Gloria Kaslow	Bettie & Stuart Muskin*	Robert A. Rifkin	Special Donor-Advised Fund
Leo Eisenstatt*	Jan Goldstein	Forrest N.* & Lisa Stewart Krutter	E. Robert & Phyllis Newman	Andrew Robinson	Maurice* & Joan Udes
Gary Epstein	Leonard Goldstein*	Steven & Bonnie Levinger	Murray Newman	Dr. Joel Schlessinger	Norman Veitzer
Paul Epstein			Jay Noddle	Harley Schragger	
Michael Erman			Steven Nogg	Jeffrey J. Schragger	

*\*Of blessed memory*

## IN MEMORIAM

# Albert Feldman

Al Feldman graduated from Central High School in 1946, he received his B.A. degree from the University of Nebraska at Omaha in 1950, and his law degree in 1953 from Michigan Law School. He started practicing law at White, Lipp and Simon in Omaha, and worked there for five years. He then formed the law offices of Stern, Harris and Feldman in 1960. When Don Stern retired, Shelly Harris and Al continued as Harris and Feldman until Al's retirement in 1987. Al and his wife, Eleanor, moved to Carlsbad, California in 2000. "I still consider Omaha as my Jewish and United States birthplace and home," stated Al Feldman, of blessed memory.



Albert Feldman

In 2017, Al and Eleanor established the Albert and Eleanor Feldman Family Israel Foundation, a supporting foundation administered by the Jewish Federation of Omaha Foundation. The mission of the Feldman Family Foundation is to implement and enhance the relationship of Omaha Jewry with Israel; to bring Omaha Jewry closer to their homeland and to recognize how important Israel is to the preservation of the Jewish people. Al explained, "I have always been a strong supporter of the State of Israel and firmly believe that the future of world Judaism is dependent on the safety and security of Israel and the support of Jews in the diaspora. Our goal is to establish a closer connection with Omaha Jewry and their Israeli brothers."

Al is survived by wife Eleanor and daughters, Lori Feldman of San Rafael, CA and Jodi Fleishman of Commerce, CA.

## IN MEMORIAM

# Arthur Davidson



Betsy and Arthur Davidson

Betsy and Arthur Davidson established the Arthur L. and Betsy Davidson Emergency Assistance Endowment Fund at the Jewish Federation of Omaha in December 2019. The fund provides one-time emergency financial assistance to people, Jewish or not, who work for the Jewish Federation of Omaha, its affiliates and agencies, synagogues and other Jewish institutions in the Omaha area. The funds can be used to cover immediate living expenses and basic necessities like food, prepayment for retainer fees for critical legal expenses, and costs relating to immigration and naturalization issues.

Arthur owned Davidson's Furniture for over 40 years, and was well respected by all those who worked for his business. He was active in many civic organizations, serving the greater Omaha community.

Arthur is survived by Betsy, his wife of 69 years, his children Mary-Beth and Bruce Muskin, Doug and Juanita Davidson, seven grandchildren and eight great grandchildren.

# Generous Kutler Gift

## ENSURES MEANINGFUL BBYO EXPERIENCES & ENCOURAGES OTHERS TO DO THE SAME



Sandy and Stuart Kutler

Fond memories of their years as BBYO members left a lasting impression on **Sandy and Stuart Kutler**. Stuart said that BBYO gave him the opportunity to develop his social and leadership skills and helped build his confidence. He credits his experiences in BBYO with him gaining the confidence to build his own business. It introduced him to a broader world of culture, arts and people. He still vividly remembers the conventions he attended and the contacts he made with other Jewish youth from around the country. To this day, Stuart counts some of those contacts among his closest friends.

In an effort to ensure that all of Omaha's Jewish teens can have the same BBYO experiences that the Kutlers enjoyed, they established the Stuart and Sandy Kutler BBYO Leadership Development and Programming Excellence Endowment Fund, administered by the Jewish Federation of Omaha Foundation. The endowment provides funding for the Omaha Jewish community's BBYO program, and is dedicated to recruitment, retention and leadership development of its members, subsidizing members' attendance at national, regional and local conclaves, conferences, and conventions, and subsidizing metropolitan Omaha-area BBYO

programming. Sandy and Stuart realize that financial need may prevent some teens from attending regional and national conventions. This fund is created to enable those teens to fully participate in all BBYO activities.

Jacob Geltzer, BBYO/Teen Program Director said, "I am so grateful to be a part of a community where people care so much about BBYO and our mission of providing more Jewish teens with more meaningful Jewish experiences. Thanks to the generosity of Sandy and Stuart, BBYO will be able to continue elevating our programs for our current members and plan more engaging programs for our new and incoming members. Not only will this encourage our teens to be involved in our local programs, but this fund will also give them the chance to see all levels of BBYO and the many conventions and leadership conferences that we offer throughout the year."

Not only did the Kutlers want to support BBYO, but they wanted to encourage others in the Jewish community to join in helping ensure the continued vibrancy of the organization. The Kutlers generously matched donations up to \$100,000.

BBYO greatly impacted Stuart Kutler's life, and with the establishment of this fund, the lives of many more Omaha Jewish teens can likewise be impacted.



Teens participating in BBYO activities

## Balance Sheet - June 30, 2020

<b>ASSETS</b>	06/30/19		06/30/20		Change
	<u>Beginning</u>		<u>Ending</u>		
Chicago Pooled Endowment Portfolio	\$28,232,362	28.93%	\$30,134,979	30.65%	\$1,902,617
Boston Jewish Community Endowment Pool	27,732,630	28.41%	27,578,310	28.04%	(154,320)
Vanguard Life Strat. Conservative Growth Fund	14,329,847	14.68%	16,702,300	16.98%	2,372,453
Vanguard Life Strat. Moderate Growth Fund	14,225,688	14.58%	16,405,259	16.68%	2,179,571
Common Stocks	3,052,864	3.13%	1,887,101	1.92%	(1,165,763)
Corporate Bonds	2,940,027	3.01%	40,000	0.04%	(2,900,027)
Alternative Investments	2,688,133	2.75%	2,346,118	2.39%	(342,015)
Short-term Investments	2,595,593	2.66%	1,650,569	1.68%	(945,024)
Israel Bonds	1,000,000	1.03%	999,963	1.02%	(37)
RBJH Capital Project and JFO Receivable	805,892	0.82%	597,360	0.60%	(208,532)
U.S. Government Securities	<u>2,371</u>	<u>0.00%</u>	<u>1,240</u>	<u>0.00%</u>	<u>(1,131)</u>
<b>Managed Assets</b>	\$97,605,407	<u>100.00%</u>	\$98,343,199	<u>100.00%</u>	\$737,792
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	2,715,129		2,756,570		41,441
Funds Held and Invested for Benefit of Federation or Its Agencies:					
Jewish Federation Reserve Funds	(3,368,387)		(2,858,394)		509,994
Custodial Funds	<u>(11,169,359)</u>		<u>(10,543,821)</u>		<u>625,538</u>
<b>Total Assets</b>	<u>\$85,782,789</u>		<u>\$87,697,554</u>		<u>\$1,914,765</u>
<b>FUND BALANCES</b>					
Restricted or Designated Endowments	\$51,129,763	59.60%	\$52,891,842	60.31%	\$1,762,079
Donor-Advised Funds	27,049,910	31.53%	27,031,998	30.82%	(17,912)
Unrestricted Endowments	4,738,790	5.53%	4,864,617	5.56%	125,826
Supporting Foundation (Pardes Foundation)	149,197	0.17%	152,527	0.17%	3,330
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	<u>2,715,129</u>	<u>3.17%</u>	<u>2,756,570</u>	<u>3.14%</u>	<u>41,442</u>
<b>Total Fund Balances</b>	<u>\$85,782,789</u>	<u>100.00%</u>	<u>\$87,697,554</u>	<u>100.00%</u>	<u>\$1,914,765</u>



## Statement of Support, Revenue, Allocations and Expenses

July 1, 2019 - June 30, 2020

Beginning Fund Balances - 07-01-19	<u>\$85,782,789</u>
Lifetime Gifts and Contributions	6,731,780
Investment Income	1,769,352
Grants and Allocations	(5,921,510)
Beneficiary Income Payments	(135,233)
Foundation Office Expense	(529,624)
<b>Net Change in Fund Balances</b>	<u>1,914,765</u>
<b>Ending Fund Balances - 06-30-20</b>	<u>\$87,697,554</u>

## Jewish Federation of Omaha Foundation Financial Highlights

as of June 30, 2020

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

Current value of funds	\$98,343,199
Current number of funds	636
Current number of donor-advised funds	134
Current number of Young Jewish Giving funds	133
Current number of endowment funds	369
Number of new funds in 2019-2020 (includes 5 new Young Jewish Giving funds)	23

### Change in funds from June 30, 2019 to present:

New contributions	\$6,731,780
Investment performance	1,769,352
Grants & Distributions	(5,921,510)
Other	(664,857)
<b>Total</b>	<u>\$1,914,765</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\*\*

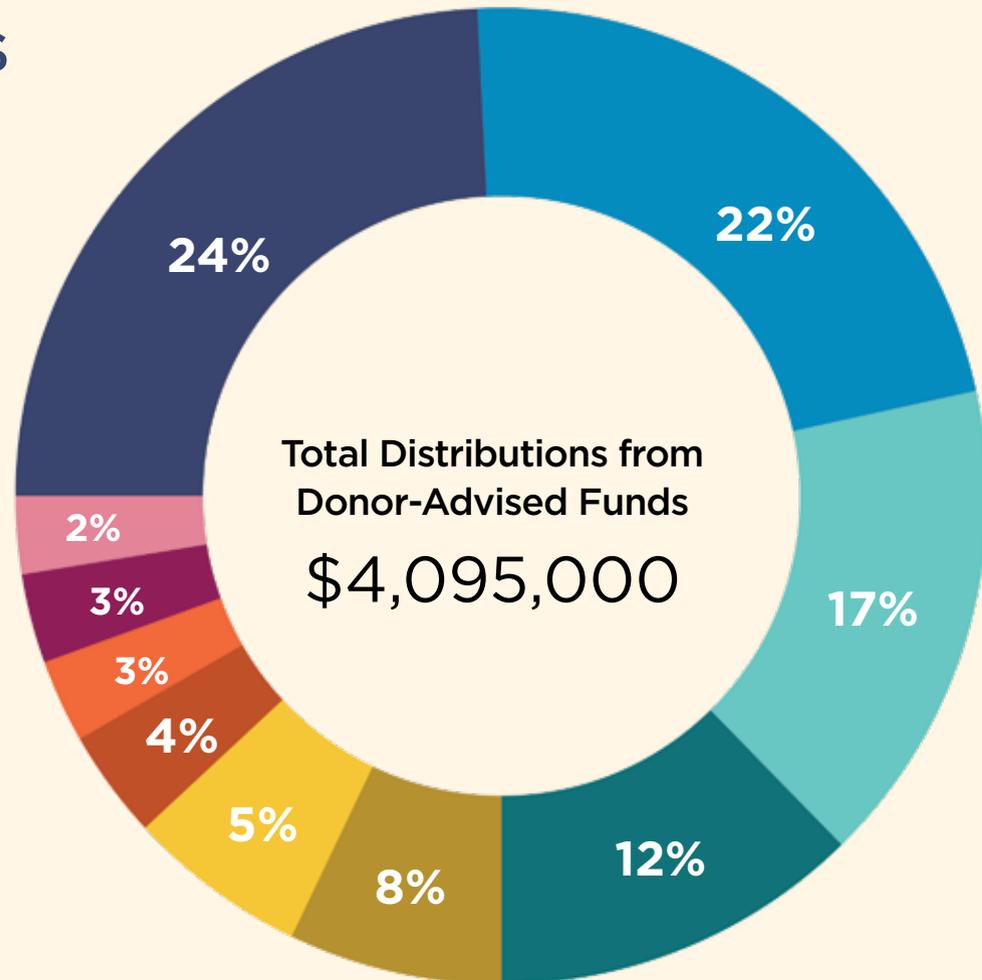
		(\$ IN MILLIONS)
Current	June 2020	\$93.3
1 Year Ago	June 2019	88.0
3 Years Ago	June 2017	72.2
5 Years Ago	June 2015	70.2
<hr/>		
Total Investment Return - 1 Year		2.74%
Total Investment Return - 3 Years		4.44%
Total Investment Return - 5 Years		3.90%

\*\*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

## 2019-2020 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.

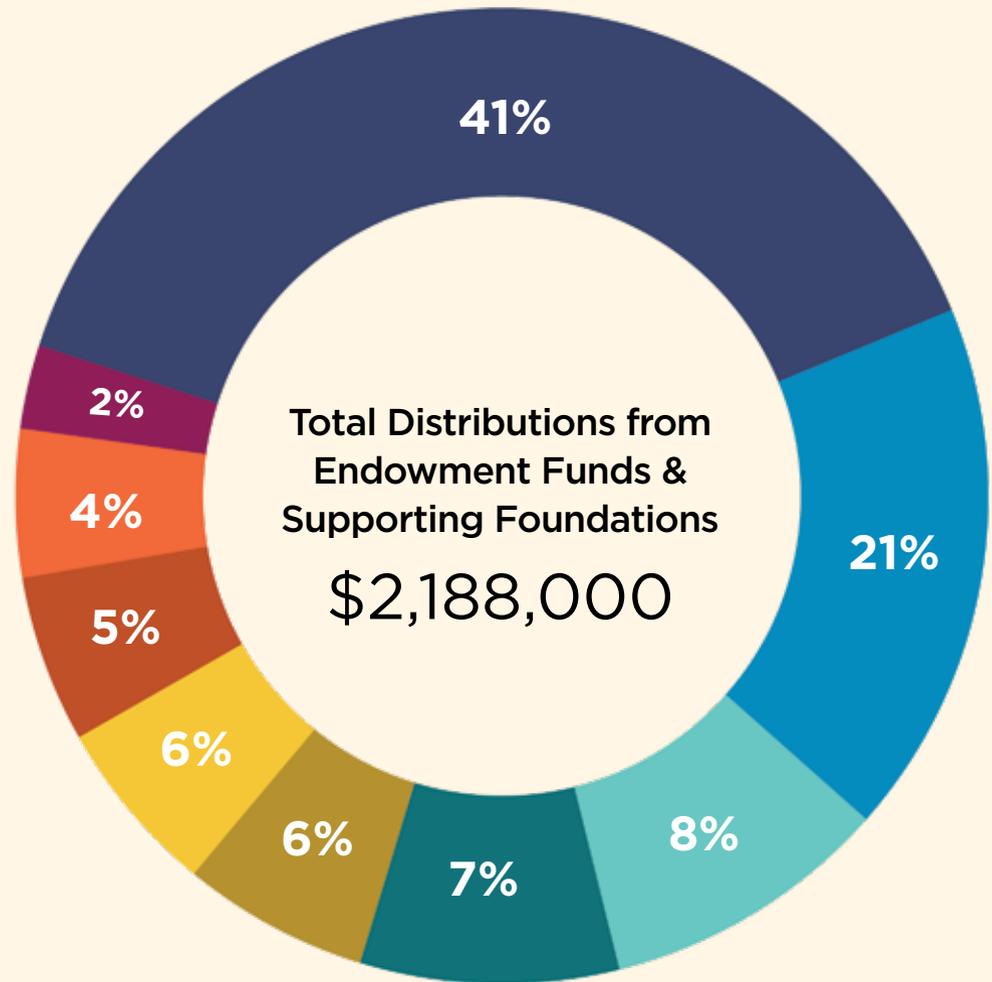


● 24%	<b>Local Secular Organizations</b>	<b>\$980,000</b>	● 5%	<b>Local Federation Agencies</b>	<b>\$193,000</b>
● 22%	<b>JFO Annual Campaign</b>	<b>\$917,000</b>	● 4%	<b>Local Jewish Organizations</b>	<b>\$175,000</b>
● 17%	<b>JCC Campus Renovation</b>	<b>\$700,000</b>	● 3%	<b>Internal Donations to Foundation Funds</b>	<b>\$135,000</b>
● 12%	<b>Local Synagogues</b>	<b>\$485,000</b>	● 3%	<b>National Jewish Organizations</b>	<b>\$125,000</b>
● 8%	<b>National Secular Organizations</b>	<b>\$310,000</b>	● 2%	<b>JFO COVID Relief Fund</b>	<b>\$75,000</b>

# ENDOWMENT FUNDS 2019-2020 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.



● 41%	<b>Jewish Social Services (RBJH/JSO/JFS)</b>	<b>\$900,000</b>
● 21%	<b>JFO Annual Campaign &amp; Operating Income</b>	<b>465,000</b>
● 8%	<b>Scholarships</b>	<b>185,000</b>
● 7%	<b>JFO Agency Programming</b>	<b>150,000</b>
● 6%	<b>JCC Programs &amp; Building Improvements</b>	<b>134,000</b>

● 6%	<b>Local Jewish Organizations</b>	<b>116,000</b>
● 5%	<b>Outside Organizations</b>	<b>104,000</b>
● 4%	<b>Sokolof Scholarships, Awards &amp; Programs</b>	<b>90,000</b>
● 2%	<b>Foundation Programs</b>	<b>44,000</b>

# Grossman Charitable Remainder Trust

## ESTABLISHED BY DEDICATED VOLUNTEERS TO PROVIDE SCHOLARSHIPS TO JEWISH YOUTH



Anne and Arthur Grossman

**Anne and Arthur Grossman**, of blessed memory, shared a deep love and commitment to Omaha's Jewish community. This love was demonstrated during their lifetimes through their numerous volunteer activities, not only in the Jewish community, but in the greater Omaha community as well. They wanted their support of the Jewish community to continue after they were gone, and therefore established a Charitable Remainder Trust. A Charitable Remainder Trust provides a steady income to the beneficiaries during their lifetimes, with the remainder going to a charitable cause upon their death. The Omaha Jewish community was the beneficiary of the Grossmans' thoughtful and generous estate planning.

The proceeds of this trust created the Anne and Arthur Grossman Scholarship Fund at the Jewish Federation of Omaha Foundation. The fund will provide scholarships to enable Jewish high school students in the Omaha metropolitan area to travel to Israel on trips sponsored by the Jewish Federation, Omaha synagogues, or Jewish youth organizations. Anne and Arthur's son, Dr. Ron Grossman said, "Aliyah, to see the land of our ancestors, is something my parents would have wished for all Jewish children."

Anne was the vice president of the Beth El Synagogue Sisterhood, and a volunteer helper in the Beth El Synagogue kitchen, along with various other secular community volunteer commitments.

Art was a dedicated volunteer in the Jewish community. He served on the boards of the Jewish Federation of Omaha, the Jewish Community Center, the Bureau for the Aging, Jewish Family Service and Beth El Synagogue. He was also on the Russia Resettlement Committee, the steering committee for Phase III of the Rose Blumkin Jewish Home, Chairman of the Old Timers Division of the Federation Campaign, on the Men's Federation campaign cabinet, the Federation telethon campaign and the Rose Blumkin Jewish Home telethon campaign. Throughout the years, Art was named Volunteer of the Year by Jewish Family Service, the Jewish Federation of Omaha and the Bureau for the Aging. He also wrote the Old Timers' Review for *The Jewish Press*.

Anne and Art Grossman wanted to continue their support of the Omaha Jewish community after their lifetimes, and by their mindful planning found a way to do so by establishing a Charitable Remainder Trust. Their thoughtfulness will be appreciated for years to come.



2019/2020 Teen Trip to Israel

# Omaha Jewish Alumni Association



because Omaha is still HOMAHA after all these years.

The Omaha Jewish Alumni Association (OJAA) was created because Omaha is #stillhomaha to many of us, even those of us who moved elsewhere years ago. The mission of the Omaha Jewish Alumni Association is to establish and secure the future of Omaha's Jewish community by connecting Jewish individuals who are currently living in Omaha with all Jewish individuals who formerly lived in Omaha and now live elsewhere.

The OJAA has grown to over 1,000 members, and hosted two wonderful events this fiscal year for its members: a Rosh Hashanah tailgate party and a reunion event in Dallas, Texas. None of this would have been possible without the passion, vision and generosity of OJAA founders Gary and Lisa Epstein, who have long been inspired by the strength of our Omaha Jewish community and dreamed about creating a place for current and former Omahans to reconnect. The Epsteins have shared that "so many people have such fun and wonderful memories of growing up in our fabulous Jewish community. It gave us the idea to create a Jewish alumni association where anyone who has grown up or attended school in Omaha, and has nostalgic feelings about our community, can connect through social media."

All of us are excited to see the continued success of the OJAA, and the opportunities that OJAA members will have to reconnect with old friends and hopefully meet new ones in the process.



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***On a personal note, I retired from my position as Omaha Jewish Alumni Association Coordinator in May. I am very grateful for the time that I had to connect with all of our OJAA members, and I thank Gary and Lisa for this opportunity. The OJAA will continue to be a vibrant and fun way for our members to connect and re-connect, and I know that the future of the OJAA will be bright. Jay Katelman has taken over and looks forward to connecting with all of you!*** –Margo Parsow



Gary & Lisa Epstein, Margo Parsow

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The OJAA will continue to reach out through articles, updates, events and social media. The OJAA is here to help you connect, so please reach out to us by posting what you love or loved about Omaha and the Omaha Jewish community on our OJAA Facebook page. You will continue to inspire our vision and purpose as we remember this is #stillhomaha!

Please connect and follow us on Facebook and LinkedIn. Or sign up to receive our monthly OJAA eNewsletter on the Foundation website.

*"OJAA has successfully been around for 2 years and we have reached over 1000 Facebook members from all over the USA. We are connecting virtually and in person (when we can) to remember the good times of living in HOMAHA. Your forever Home!"*

**Lisa and Gary Epstein, OJAA Founders**

# LIFE & LEGACY™ PROGRAM COORDINATOR REPORT 2020

It has been an unusual year 6 for the LIFE & LEGACY™ program in our community as the world has experienced great disruption and devastation from the COVID-19 pandemic. In spite of the challenges that everyone has faced, we have managed to survive and thrive. Our Omaha Jewish community stood together as one even as we were encouraged to socially distance. Over the past 6 years, the Omaha Jewish community LIFE & LEGACY program has received 655 signed commitment letters with an estimated dollar amount of \$20,855,403. This accomplishment would not have been possible without our nine partner organizations, their lay leaders and volunteers. The partner organizations are the ADL/CRC, Institute for Holocaust Education, Nebraska Jewish Historical Society, Chabad House, Friedel Jewish Academy, Temple Israel, Beth El Synagogue, Beth Israel Synagogue and the Jewish Federation of Omaha. Additionally, we wish to recognize the vision, leadership and support of our JFOF board and our generous donors.

During the beginning of LIFE & LEGACY fiscal year 7, we added a tenth partner organization. We are so excited to announce the addition of B`nai Israel Synagogue of Council Bluffs, Iowa.

On a personal note, I retired in May after 6 years of being a part of this wonderful program and the Jewish Federation of Omaha Foundation. It has been a privilege to be a part of this partnership with the Harold Grinspoon Foundation LIFE & LEGACY initiative and to help cultivate a culture of legacy giving, foster camaraderie among Jewish organizations and secure the future of our amazing Omaha Jewish community. My heartfelt thanks and appreciation to all who have made my journey so meaningful and for your support that you have so generously given. Beginning in June, Jay Katelman took over the position of LIFE & LEGACY Coordinator and looks forward to continuing and growing LIFE & LEGACY in the Omaha community!



Very Sincerely Yours,

Margo Parsow  
LIFE & LEGACY Coordinator



A program of the **HAROLD GRINSPON FOUNDATION**

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



**The Jewish Federation**  
OF OMAHA

*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!*

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Howard & Sharon Epstein  
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 Aveva & Martin Shukret  
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 Liat Shyken  
 Paul Shyken  
 Susann Shyken  
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 Deborah & Speedy (Dr. Eugene) Zweiback  
 Rosie Zweiback & Mace Hack

\*Of Blessed Memory  
 Names as of December 11, 2020

*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

**Jay Katelman**  
 LIFE & LEGACY Coordinator  
 402-334-6461  
 jkatelman@jewishomaha.org



# 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.



Margo Parsow, Linda Pollard, Howard N. Epstein, Janet Henthorn, and Laurie Peatrowsky at the Foundation retirement party

## 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) 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 2020 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:



**Howard N. Epstein**  
Executive Director  
(402) 334-6466  
[hepstein@jewishomaha.org](mailto:hepstein@jewishomaha.org)



**Laurie Peatrowsky**  
Operations Manager  
(402) 334-6439  
[lpeatrowsky@jewishomaha.org](mailto:lpeatrowsky@jewishomaha.org)



**Diane Walker**  
Fund and Scholarship  
Administrator  
(402) 334-6551  
[dwalker@jewishomaha.org](mailto:dwalker@jewishomaha.org)



**Jay Katelman**  
LIFE & LEGACY and OJAA  
Coordinator  
(402) 334-6461  
[jkatelman@jewishomaha.org](mailto:jkatelman@jewishomaha.org)



**Linda Pollard**  
Endowment Assistant/  
Staff Writer  
(402) 334-6459  
[lpollard@jewishomaha.org](mailto:lpollard@jewishomaha.org)

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Gloria Kaslow

*Thank You*

The Foundation board and staff would like to extend sincere thanks to Gloria Kaslow for her dedication as a member of the Foundation Board. Gloria served from 2013-2020.