



Jewish Federation of Omaha

Foundation

SERVING

Omaha's Jewish Community

2021 ANNUAL REPORT

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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.



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.



“Serving others is one
of the pillars upon
which Judaism rests.”

- Lynn Schusterman

A MESSAGE FROM THE PRESIDENT



David Gilinsky

I want to start by saying what an honor and a privilege it's been to serve as President of the Jewish Federation of Omaha Foundation these past two years. The Foundation makes a significant positive impact on our community year-after-year. And I'm very excited to welcome Bob Belgrade as our new president. Bob brings an incredible breadth and depth of experience to the position. Bob has served in a multitude of leadership roles

in many organizations in the Jewish community, both inside and outside of the Federation over the last 30 years.

In last year's annual report, I closed my message with the wish "Here's to a more predictable and healthier year!" Well, that was a nice thought. Speaking from a personal point-of-view, I had the unfortunate experience of getting up-close and personal with COVID-19 for 10 days in November. On the positive side, I completely recovered. Overall, I'd have to say that, collectively, we are healthier with the benefit of vaccines that are incredibly effective against the virus. However, I won't give the world high marks for being "more predictable". Lately, it feels like two steps forward and one step back.

But rest assured that, in this anxiety-inducing, break-neck paced, unpredictable world we live in, you can count on the Foundation. It is a well-managed, stable and predictable organization that consistently helps ensure the continuity of Jewish life in Omaha. We are professionally led by our dedicated and experienced Executive Director, Howard Epstein, who consistently strives to

improve our organization and extend its reach. In turn, he leads an incredibly talented professional staff, all of whom bring a wealth of knowledge and experience to the table. We are fortunate to have this team supporting us. And I would be remiss if I did not recognize and thank our fantastic Board of Directors who help forge our direction while keeping a steady hand on the wheel.

As volatile as the past year has seemed, the Foundation's portfolio has benefited from the robust market environment. For the fiscal year ending June 30, 2021, our managed assets have grown to a record \$120,699,608, experiencing an annual return of an unprecedented +22.7%. This asset level is even more impressive when you consider the Foundation disbursed \$6.36 million over the past year. And we could not do any of this without your generosity. I am both amazed and inspired by each of you who chose to create an endowment, gave to an existing endowment or created your own donor-advised fund for the benefit of our community. Together, we will help forge our community's future!

Once again, here's to a more predictable and healthier year!

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

David Gilinsky
Board President

A MESSAGE FROM THE EXECUTIVE DIRECTOR

Each year, the Jewish Federation of Omaha Foundation provides a snapshot of the recently completed fiscal year. This annual report is the Foundation's historical archive, a document to be read and analyzed today and by future generations.

What will those future generations say about the fiscal year that ended June 30, 2021, the first full fiscal year of the COVID-19 pandemic? We emerged from lockdown after millions died from this terrible virus, and hundreds of millions were sickened by it, including some family, loved ones, and friends here in Omaha. Face masks were the norm, we used copious amounts of hand sanitizer, installed plexiglass barriers in customer service areas, hoarded toilet paper, battled civil and political unrest and extreme uncertainty about the strength and stability of our economy.

Effective COVID vaccines have been developed and administered, people returned to work and school, and the economy and financial markets rebounded. As I write this report, the future is bright, despite an undercurrent of uncertainty and anxiety as new strains of COVID emerge.

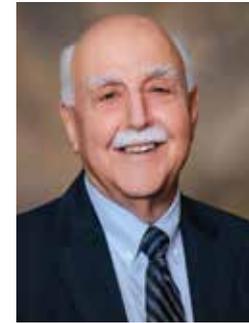
Throughout the pandemic, thanks to your exceptional generosity, the Foundation provided financial support and stability that was so desperately needed, distributing \$6.36 million from endowments, donor-advised funds and supporting foundations to support the Federation and its agencies, to provide scholarships, to support the needy, and to benefit numerous causes locally and nationally.

Thanks to generous donors and a robust investment performance, the Foundation's total assets under management grew to a record level of over \$120 million. We truly appreciate your support.

I thank the Foundation Board of Directors for their guidance, oversight, and advice, all to benefit the Foundation and Omaha's Jewish community. A special note of thanks goes to David Gilinsky, who completed his two-year term as Foundation Board President. It has been my pleasure to work closely with David, and to benefit from his leadership, perspective, and advice. David will remain as an active and engaged board member.

We welcome Bob Belgrade as the new Board President. Bob has been a dedicated volunteer in Omaha's Jewish community and the broader Omaha community his entire life, and we look forward to his leadership.

This year, Norman Veitzer stepped away from the board after more than 20 years of service. We thank Norm for his dedication, passion and support. At the same time, we welcome new board members Mike Abramson and Susan Lehr.



Howard Epstein

The Foundation staff continues to do an incredible job. Each of them is hard working and dedicated, and they successfully navigated and moved us forward during this challenging COVID year. Following Janet Henthorn's retirement, we were pleased to promote Laurie Peatrowsky. Laurie has capably and admirably stepped into her role as Foundation Operations Manager.

We welcomed Diane Walker as the Foundation Fund and Scholarship Administrator. Diane is an integral part of the Foundation staff, and has terrific rapport with our donors and supporters.

Jay Katelman just completed 12 months as LIFE & LEGACY and Omaha Jewish Alumni Association Coordinator. COVID restricted in-person interaction with members and supporters, yet both LIFE & LEGACY and OJAA grew and prospered under Jay's leadership.

Linda Pollard, Foundation Endowment Assistant and Staff Writer for the past six years capably, cordially and willingly assists in day-to-day Foundation matters. She remains the "go to" person whenever an article or story needs to be written.

With much thanks,

A handwritten signature in black ink that reads "Howard N. Epstein". The signature is fluid and cursive, written over a white background.

Howard N. Epstein
Executive Director

TED SELDIN A “BUILDER,” A TRUE MENSCH

The Jewish Federation of Omaha Foundation lost a long-time board member this year with the passing of Ted Seldin. Ted helped to establish the Foundation and served on the board until 2018, serving two years as chairman. He served as an emeritus member after 2018. Ted lived a life of commitment and service to his community and beyond. He graduated from the University of Iowa with BA and JD degrees. Ted was a co-owner of Seldin Company, and was committed to building affordable housing for communities that are underserved. Ted was a dedicated volunteer, leader in the real estate industry, generous contributor to his alma mater, the University of Iowa, and to many causes in the Midwest, including unwavering support for metropolitan Omaha’s Jewish community.

Ted is survived by his wife of 64 years, Sarah, daughters and sons-in-law Stephanie (Rodger) Howard and Beth (Amnon) Dotan. Ted is also survived by four grandchildren, Liatte Dotan, Yonatan Dotan, Alexander Howard, and Adam Howard.

Ted and Sarah signed a LIFE & LEGACY Letter of Intent in 2017, and they also created a charitable remainder trust. With proceeds from this trust, Sarah honored her and Ted’s 2017 LIFE & LEGACY Letter of Intent, and established the Ted and Sarah Seldin LIFE & LEGACY Endowment Fund. This new endowment will support the general operations, administration and programs of the Jewish Federation of Omaha Foundation.

Ted and Sarah also established the Ted and Sarah Seldin Family RBJH Activities Endowment Fund in 2014, which provides programs and activities for the benefit of the residents and is also used to enhance the grounds and buildings of the Blumkin Home.

Ted was passionate about creating affordable housing and worked on national and local legislation to build fair and affordable housing. He had a major role in the creation of the Greater Omaha Housing and Community Development Corp. Seldin Company, with Ted’s leadership, was instrumental in building affordable housing, consisting of single-family homes, apartments and senior-living homes throughout Nebraska and Iowa.



Ted and Sarah Seldin



Seldin grandchildren; Alexander Howard, Adam Howard, Liatte Dotan, and Yonatan Dotan

“Often Ted’s contributions would support how the structure of an organization was maintained. So as a “builder,” he was always concerned about how things like structure, maintenance, and foundation held up.”

-Sarah Seldin

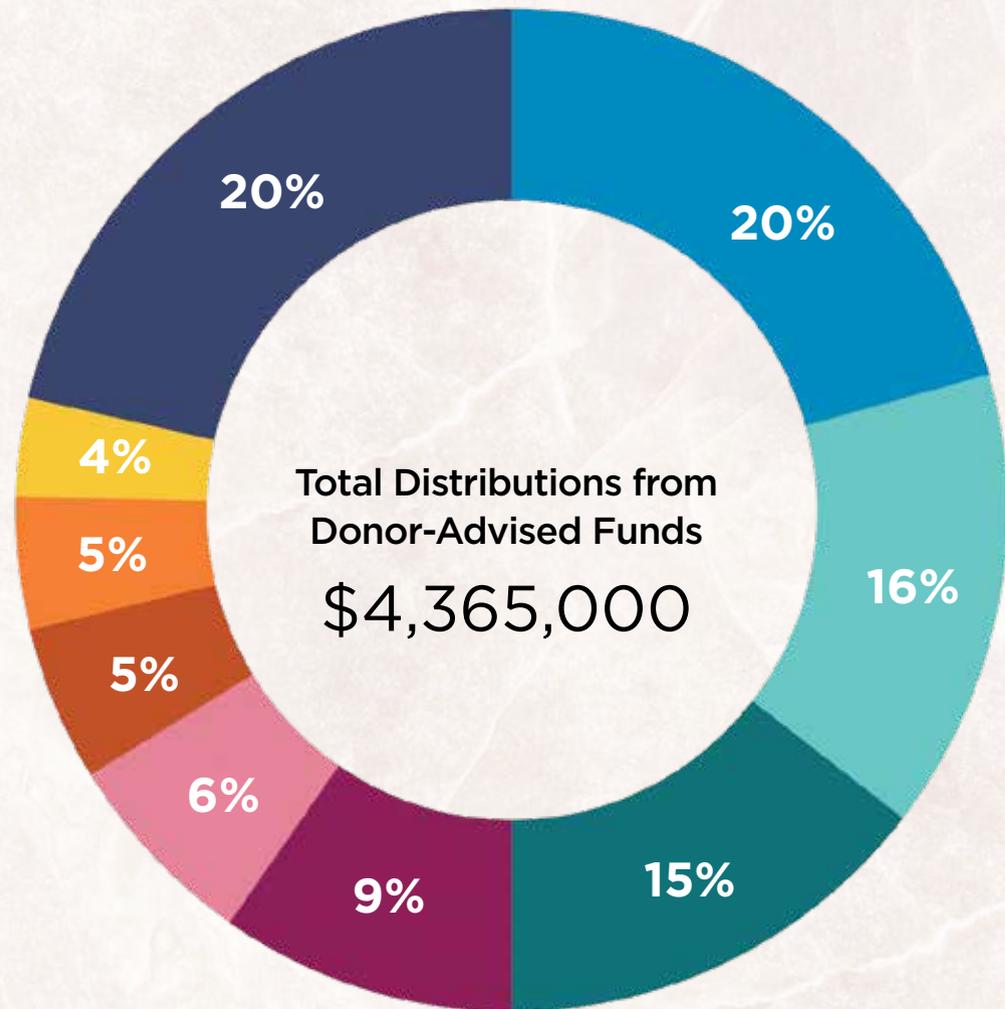
During his life, Ted was the recipient of many awards recognizing his work and his commitment to helping others. He received the Distinguished Alumni Award and the College of Law Alumni Achievement Award from the University of Iowa. He was inducted into the Omaha Chamber of Commerce Hall of Fame, as well as the Omaha Jewish Business Leaders Hall of Fame. In 2015, Ted and Sarah received the Jewish Federation of Omaha’s Humanitarian of the Year Award.

Howard Epstein, Executive Director of the Foundation said, “Ted had an ongoing passion for and a commitment to the Jewish Federation of Omaha Foundation. From the Foundation’s inception, Ted realized the impact our Foundation endowments and donor-advised funds could have on our community. Each time we talked, he was keenly interested in the progress and success of the Foundation, always willing to offer his wisdom and advice. All of us at the Foundation will miss him. Ted Seldin was truly a mensch.”

Ted was an exceptionally successful businessman, who was a compassionate, caring and generous man, but more importantly he was a loving husband, father and grandfather, and loyal friend to many. The Foundation is immensely fortunate to have known and worked with Ted.

DONOR-ADVISED FUNDS 2020-2021 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.

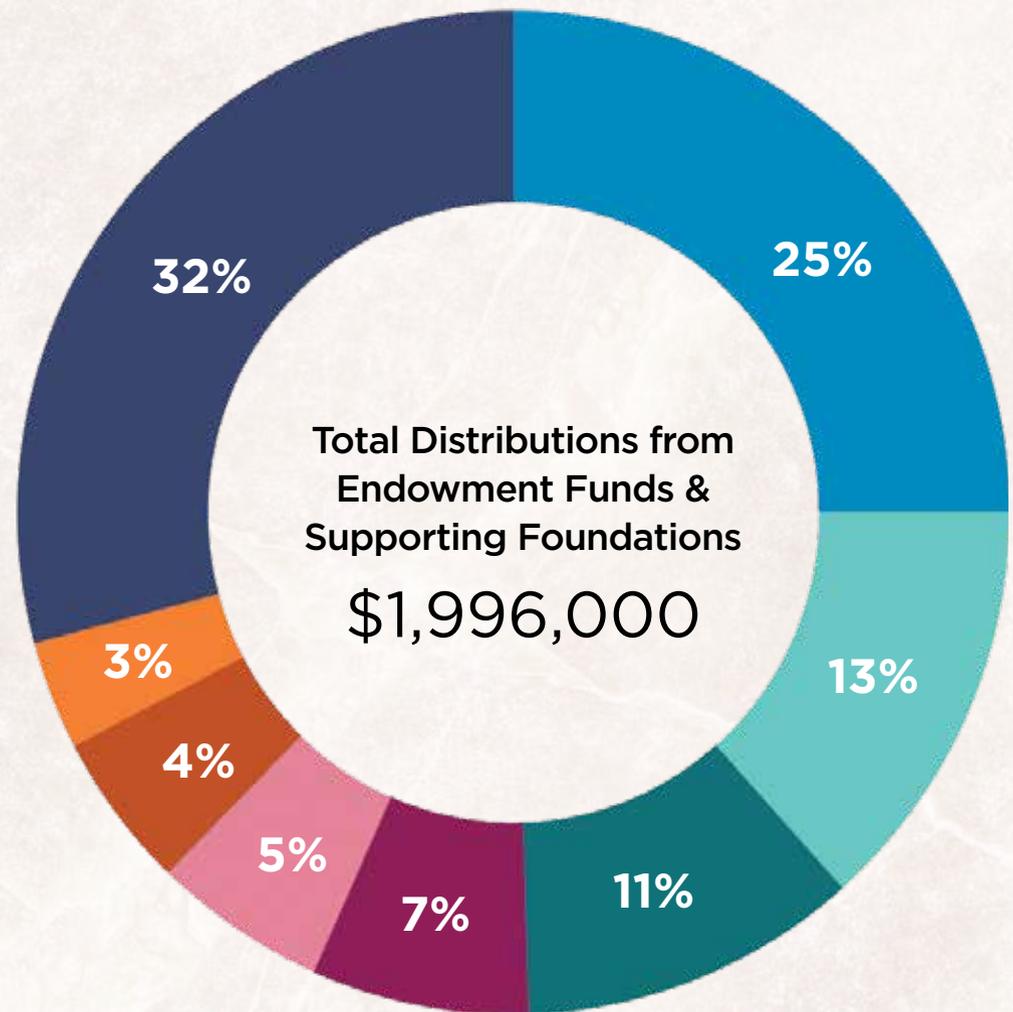


● 20%	JFO Annual Campaign	\$880,000	● 6%	Local Jewish Organizations	250,000
● 20%	Local Synagogues	853,000	● 5%	National Secular Organizations	235,000
● 16%	Local Secular Organizations	712,000	● 5%	Local Federation Agencies	224,000
● 15%	Internal Donations to Foundation Funds	645,000	● 4%	National Jewish Organizations	176,000
● 9%	JCC Campus Renovation	390,000			

ENDOWMENT FUNDS 2020-2021 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.



● 32%	Jewish Social Services (RBJH/JSO/JFS)	\$641,000
● 25%	JFO Annual Campaign & Operating Income	498,000
● 13%	Scholarships	261,000
● 11%	Local Jewish Organizations	225,000

● 7%	Sokolof Scholarships, Awards & Programs	143,000
● 5%	JFO Agency Programming	93,000
● 4%	JCC Programs	75,000
● 3%	Outside Organizations	60,000

FOUNDATION IMPACT



- Some programs that received support from the Foundation include **JCC Musical Theater, Partnership2Gether, BBYO Scholarships, Support for Holocaust Survivors, Kosher Meals on Wheels, JFS Financial Assistance, Shaliach Programming, Jewish Press Internship**
- **49%** of donor-advised distributions supported the **Jewish Federation and its agencies**
- The Foundation Grants Committee approved **\$30,000** in grants to **Jewish Federation agencies, local synagogues** and **Jewish organizations**

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 EARLY LEARNING 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
- **Simon** Family JCC Theater and Dance 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
- Dr. Hugh S. & Corinne K. **Levin** Memorial 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
- **Lieberman** Family of Scottsbluff, Nebraska Endowment Fund for Special Needs Population
- **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
- 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
- Robin & Bennett **Greenspan** Hall of History Featured Exhibit Endowment
- 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 **Meiers** Jewish Experience Scholarship Endowment
- John H. **Mosow** and Ellin B. **Siegel** LIFE & LEGACY 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
- Iris J. and Martin C. **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

- Milton Mendel & Marsha **Kleinberg** Hall of History Maintenance, Repair and Replacement Endowment
- Susie and Mike **Norton** Federation Campus Maintenance Endowment Fund
- **Riekes** Family Federation Campus Maintenance Endowment Fund
- Michael **Staenberg** Campus Repair, Renovation and Replacement Endowment Fund
- Benjamin and Anna E. **Wiesman** Family Reception Room Maintenance Endowment
- 2020 JFO Facilities Repair & Replacement Endowment

JEWISH FEDERATION OF OMAHA FOUNDATION

- David and Helen **Brodkey** Endowment for the Foundation
- Yale **Richards** Professional Education Endowment
- Ted and Sarah **Seldin** LIFE & LEGACY Endowment
- Pardes Foundation

LIFE & LEGACY FUNDS (MULTI-PURPOSE)

Funds supporting more than one partner. (Funds benefitting one sole partner listed in respective category. See pages 23-25 for more information.)

- Sandra **Belgrade** LIFE & LEGACY Endowment
- Arthur and Betsy **Davidson** LIFE & LEGACY Endowment

- Gary and Barbara **Goldstein** LIFE & LEGACY Endowment
- Carole **Lainof** 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
- Etta & Harold **Epstein** Security Fund
- 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
- Ruby **Platt** Allyship Initiative 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
- Sissy **Silber** LIFE & LEGACY 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
- Sissy **Silber** LIFE & LEGACY Endowment for Chabad Lubavitch of Nebraska
- 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
- **Stenberg** Family Holocaust Education Scholars Program Fund
- 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
- Stuart Richard **Rochman** Memorial NJHS 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

TEMPLE ISRAEL

- Joanne & Jerry **Freeman** LIFE & LEGACY Endowment
- 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 2020-2021 (July 1, 2020 - June 30, 2021)

Harold Epstein
 Etta & Harold Epstein Security Fund

Harold Forbes
 Herbert R. & Ruth L. Forbes Fund

Marvin Gilman
 Randy and Marvin Gilman
 Scholarship Fund

Dr. Hugh S. Levin
 Dr. Hugh S. & Corinne K. Levin
 Memorial Endowment

Barbara and Dr. Stanley J. Malashock
 Stanley and Barbara Malashock Camp
 Scholarship Endowment

Bettie Muskin
 Bettie & Stuart Muskin JSS Endowment
 Bettie & Stuart Muskin PACE Fund
 Bettie & Stuart Muskin JCC Youth Sports Fund

Theodore M. Seldin
 Ted and Sarah Seldin Family RBJH
 Activities Endowment

Ted and Sarah Seldin LIFE & LEGACY
 Endowment

Phyllis Sherman
 Phyllis & Irvin Sherman Family
 Endowment

Alan Simon
Bruce Simon
 Simon Family JCC Theater & Dance Fund

LIFE & LEGACY
Elliot B. Brown
Harold Epstein
Cantor Leo Fettman
Don Klein
Barbara Malashock
Dr. Stanley J. Malashock
Ann Modenstein
Steve Pitlor
Theodore M. Seldin

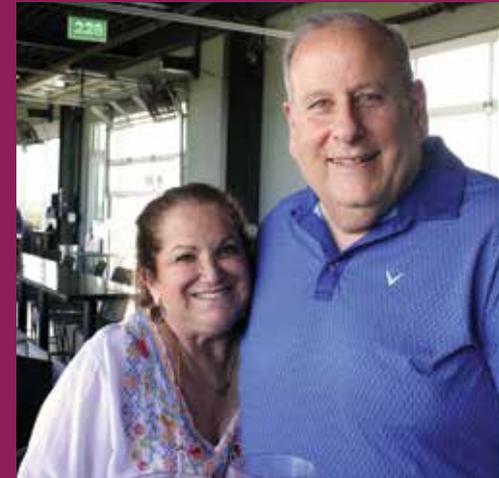
FOUNDATION IMPACT



The OJAA Topgolf Omaha Fundraiser raised **\$7,000** for Early Learning Center Scholarships



\$1.4 million to support the Jewish Federation Annual Campaign and operations from donor-advised and endowment funds



LIFE & LEGACY has received **684** signed commitments with an estimated dollar value of **\$24.3 million**

LION OF JUDAH ENDOWMENT

A Lion of Judah Endowment (LOJE) Fund is created by establishing a fund of at least \$120,000 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		



Kimberly Robinson, Nancy Schlessinger, Sharon Kirshenbaum and Cindy Goldberg



Kathy Goldstein, Marty Ricks, Don Goldstein, Iris Ricks

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

**Of blessed memory*

GREENSPAN'S STRONG CONNECTION TO OMAHA ENSURES JEWISH HISTORY FOR GENERATIONS

“You know, you can take the boy out of Omaha but you really can't take Omaha out of the boy.” - Bennett Greenspan

The son of Bud and Rosalie Greenspan, Bennett was born and raised in Omaha, and now lives with his family in Houston. Although Bennett hasn't lived in Omaha for over 40 years, he still has a strong connection to his hometown. It is such a strong connection that Bennett, like many former Omahans, wanted to help in the renovation of the JCC. Bennett and his wife, Robin, recently created the **Robin and Bennett Greenspan** Hall of History Featured Exhibit Endowment Fund at the Jewish Federation of Omaha Foundation. Bennett and Robin also contributed to the Jewish Federation of Omaha's renovation project, donating funds used in the design and construction of the Milton and Marsha Kleinberg Hall of History.

The endowment fund was established to provide funding for one featured exhibit each year in the Kleinberg Hall of History at the JCC. Renee Corcoran, recently retired Executive Director of the Nebraska Jewish Historical Society said, “We are very grateful for the support of Bennett and Robin Greenspan. Their generosity gives us the opportunity to share the rich history of our Jewish community with exhibits in the Hall of History. Bennett and Robin know the importance of telling the stories of our past to make a better future for generations to come.”

After graduation from Westside in 1970, Bennett attended the University of Texas where he majored in political science and minored in history. Bennett returned to Omaha after graduating from college and worked in a family business. After a few years in Omaha, Bennett was ready to move south to Houston. Bennett said, “After about 5 years in Omaha, I felt the need to live in a city with a much larger Jewish population, so I moved south.”

Bennett has established several businesses including Family Tree DNA and Gene by Gene, Ltd. Family Tree DNA helps consumers use DNA to trace family history. Gene by Gene, Ltd. is a testing laboratory in Houston which performs the genetic testing.

Bennett's love of history ended up guiding his career path, not only helping him with his family history, but helping many others track their family histories, as well. Bennett said, “Omaha is my birthplace and as such it has and will always have a special place in my heart and memory.” It can be said with certainty, that the Omaha Jewish community will always have a special place in its collective heart for Bennett, as well.



Robin and Bennett Greenspan



Milton and Marsha Kleinberg, lead donors of the Milton and Marsha Kleinberg Hall of History



Bennett and Robin Greenspan also contributed to the Jewish Federation of Omaha's renovation project, donating funds used in the design and construction of the Milton and Marsha Kleinberg Hall of History.

OJAA GROWING STRONGER BECAUSE WE ARE #STILLOMAHA

This year was a very unique year for the Omaha Jewish Alumni Association (OJAA). Due to the COVID-19 pandemic, we were unable to put together an in-person event until August. We have still yet to travel out of Omaha again to connect former Omaha residents in their current cities; however, we hope it is safe to travel and gather in 2022. We are looking forward to hosting more out-of-town events when it is permissible again. With that being said, the OJAA found many different ways to keep building on the momentum that has been created. This is because Omaha is still close to the hearts of those that have moved elsewhere, and the reason we use #stillhomaha in our marketing. This year we have increased our following on Facebook, and more importantly, increased the level of engagement among our members from all over the country. OJAA increased its membership in the newly formed LinkedIn group, added a brand-new Instagram page to help connect with a wider audience, and started a monthly OJAA Newsletter to inform our followers to what is going on in our community and nationally.

We are very proud to have been able to host a virtual gathering via Zoom for our Texas OJAA members this year, an event where people could get together virtually and chat and catch up. We also hosted a virtual trivia night where we had around 60 individuals from all over the country who participated in a professionally done trivia night that was based on Omaha and Jewish trivia. Finally, in August 2021, the Omaha Jewish Alumni Association held its first in-person event at Topgolf Omaha. It was called the First Annual OJAA Charity Golf Outing and the net proceeds went to support the JCC Pennie Z. Davis Early Learning Center. We sold out registrations after having 96 individuals



From left to right: Larry Kelberg, Hayley Barnes, Jim Haitt, Stephanie Shapiro-Cohen, David Shapiro, and Bob Belgrade



Front Row: Max Goranson and Taylor Nogg
Back Row: Rex Konigsberg, Cory Nogg, Jaime Nogg, Brian Nogg

register for the event. The event raised \$7,000 dollars that will be used for Pennie Z. Davis Early Learning Center scholarships to help make our wonderful Early Learning Center more affordable for young growing families! As always, I'd like to thank Gary and Lisa Epstein, who without their vision, OJAA would not be the organization it is today. I'd also like to thank our board, who has worked so hard this year considering the many challenges and restrictions we have faced as a community and country. We look forward to an exciting 2022!

LIFE & LEGACY™ PROGRAM COORDINATOR REPORT 2021

Due to the COVID-19 pandemic, Year 7 started with as much disruption and devastation as year 6 ended with. Despite the many challenges we have faced as a community, our Omaha area Jewish community stood united. While we have started to get out to masked and socially distanced events, to this day, things are still not the same. Over the past 7 years, the Omaha Jewish community LIFE & LEGACY™ program has received 684 signed commitments with an estimated dollar amount of \$24.3 million. The increase in commitments this past year would not be possible without the tireless efforts of our ten partner organizations, their lay leaders, and generous volunteers. The local 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, B'nai 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.

We look forward to what Year 8 has to bring. On a personal note, I'm very much looking forward to hopefully being able to get out in the community, and to have more face-to-face meetings with individuals. If you would like to make a LIFE & LEGACY commitment, or just learn more about the initiative, please contact me at (402) 334-6461, or at jkatelman@jewishomaha.org. LIFE & LEGACY is a fantastic way to honor your favorite Omaha area Jewish Organizations!



Stay well,

Jay Katelman
LIFE & LEGACY Coordinator



Assuring JEWISH TOMORROWS

A program of the HAROLD GRINSPOON FOUNDATION

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!

Rabbi Steven Abraham
Michael & Sheri Abramson
Michael Albert*
Anonymous (39)
Ansari Family
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
Bruce H. Brodkey & Marcia A. Hoffman
Ron Brodkey*
Miriam Brooks
Carrie & Josh Brown
Elliot Brown*
Michelle Byrnes*
Beth Cohen
David & Karla Cohen
Marla & Bob Cohen
Drs. Michael & Karen Cohen & Family
Daniel Cohn
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
JohnCarl Denkovich
Pam & Dennis DePorte
Beth Seldin Dotan
Eric Dunning
Toba Cohen-Dunning
Penny Krasne Endelman
Alex Epstein
Harold Epstein*
Howard & Sharon Epstein
Irving Epstein
Lindsay Epstein
Lisa & Gary Epstein
Mel Epstein
Paul & Sandy Epstein
Dr. Steven R. 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
Arlene Fredricks
Jerry Freeman
Joanne Freeman*
Robyn & Bob Freeman
Julie & Jim Fried
Ted & Jamie Friedland
Bruce & Pam Friedlander
Amy & Sanford Friedman
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Steven M. Friedman
Lynne Friedel Gellman
Howard E. Gendelman
H. Lee & Carol Gendler Charitable Fund
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Ronald Giller
Darlene & Sherman* Golbitz
Andi Goldstein
Donald E. Goldstein
Gary & Barbara Goldstein
Jan Goldstein
Kathy Goldstein
Dora Goldstrom
Mark Goldstrom
Alan Goodman*
David & Shirley Goodman
Andie Gordman & Dan Fitzgerald
Jay & Allison Gordman
Kip & Bridget 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)
Bennett & Robin Greenspan
Joshua & Amanda Gurock
Mendy & Michael Halsted
Andrea & Marc Hamburg
M'Lee Hasslinger
Bonnie Kuklin Horwich
Jon Jabenis
Randi Friedel Jablin
Joan Sandler Jacobson
Richard Jacobson
Gary & Karen Javitch
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Frances Juro
Richard Juro
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Gary* & Sally Kaplan

Myron Kaplan
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Gloria C. Kaslow
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Carole A. Lainof
K. Wayne & Carole A. Lainof
Randal Langdon
Sharon Comisar-Langdon
Barbara Lashinsky
Joanie Lehr
Sandy & John Lehr
Mike & Bobbi Leibowitz
Paula A. Lenz
Vincent P. Lenz
Steve & Bonnie Levinger
Rochelle Lewis
David Lieberman
Felicia & Scott Littky
Mario Lopez
Steve* & Thelma* Lustgarten



Trenton B. Magid
 Diane & Larry Malashock
 Dr. Edward & Sally* Malashock
 Jody & Neal Malashock
 Stanley* & Barbara* Malashock
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 Janie & Allan Murow
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 Murray & Sharee Newman
 Dr. Patricia Newman
 Phyllis & E. R. "Bob" Newman
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 Patty Nogg
 Steve Nogg
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 Zoë Riekas
 Bob Rifkin
 Jane & Harlan Rips
 Stuart Richard Rochman*
 Jonathan Rockman
 Stacey Rockman
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 Debbie & Lloyd Roitstein
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 Esther Silver
 Denise C. Silverman
 Stanley* & Norma* Silverman
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 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
 Jeff Zacharia
 Renee Zacharia
 Steve & Kathy Zalkin
 Charlotte* & Morley* Zipursky
 Sally & Jim Zipursky
 Deborah & Speedy (Dr. Eugene) Zweiback
 Rosie Zweiback & Mace Hack

*Of Blessed Memory
 Names as of November 19, 2021

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



EPSTEIN BROTHERS HONOR PARENTS BY PROVIDING SECURITY FOR THE JEWISH COMMUNITY

Etta and Harold “Bae” Epstein were blessed to share 70 years of marriage, three sons, Paul, Gary and Steven, their love of the Jewish community and their generosity to both the Jewish and secular communities.

In order to pay tribute to their parents’ lives and carry on their legacy of supporting the Jewish community, Paul, Gary and Steven Epstein established the Etta and Harold Epstein Security Fund at the Jewish Federation of Omaha Foundation. This newly established fund will provide funding for security for police and other law enforcement and security personnel for more well-attended Jewish community events each year.

“Security is becoming more and more of a challenge with threats in our society, with white supremacy and other groups, nationally and locally. Etta and Bae Epstein loved their Jewish Heritage and close friends and family in Omaha and would want to know that they helped create the safety for large Jewish get togethers in Omaha,” said Gary.



Etta and Harold “Bae” Epstein

Paul stated, “Anti-Semitic violence, discrimination and expressions of hostility have created a climate of fear among a substantial number of Jews, impairing their ability to enjoy their rights to liberty and security. Our Jewish community offers many wonderful events in all of its agencies and we want to ensure this continues to be a safe environment.”

Etta was a devoted and involved mother to her three sons. She volunteered in their schools and various activities, Hadassah, the National Council of Jewish Women, and Beth El Sisterhood.

After Bae’s military service in World War II, he worked for McKesson Wine & Spirits where he advanced rapidly. Bae became the Midwest regional vice-president of the company with responsibility for nine wholesale liquor houses in six states. Bae purchased the wine and spirits division of Capitol Liquors in September of 1975.

Bae’s volunteer activities included Israel Bonds and B’nai B’rith, along with various secular causes. Bae and Etta helped build the Harold and Etta Epstein Family Chapel of Remembrance at Beth El Cemetery.

Etta and Bae Epstein’s legacy of love for their community is suitably remembered and honored now and throughout the years by helping to ensure security at events and programs in the Jewish community.

“My parents taught my brothers and me the meaning of being Jewish and the importance of practicing our Judaism and the importance of giving Tzedakah. They felt fortunate to be part of the wonderful Omaha community and they ingrained into each of us the significance of giving back to the community that we grew up in. We were blessed with parents that loved us unconditionally and for that we honor the memory of our loving parents, Harold and Etta Epstein.”

- Dr. Steven Epstein

BALANCE SHEET - JUNE 30, 2021

ASSETS	06/30/20		06/30/21		Change
	<u>Beginning</u>		<u>Ending</u>		
Chicago Pooled Endowment Portfolio	\$30,134,979	30.64%	\$34,092,952	28.26%	\$3,957,973
Vanguard Life Strat. Moderate Growth Fund	16,405,259	16.68%	25,016,155	20.73%	8,610,896
Vanguard Wellington Admiral Fund	0	0.00%	24,755,274	20.51%	24,755,274
Vanguard Life Strat. Conservative Growth Fund	16,702,300	16.98%	23,973,894	19.86%	7,271,594
Alternative Investments	2,346,118	2.39%	3,151,661	2.61%	805,543
Short-term Investments	1,651,809	1.68%	2,968,900	2.45%	1,317,091
Boston Jewish Community Endowment Pool	27,578,310	28.04%	2,712,421	2.25%	(24,865,889)
Common Stocks	1,887,101	1.92%	2,511,606	2.08%	624,505
Israel Bonds	999,963	1.02%	1,000,000	0.83%	37
RBJH Capital Project and JFO Receivable	597,360	0.61%	476,745	0.39%	(120,615)
Corporate Bonds	<u>40,000</u>	<u>0.04%</u>	<u>40,000</u>	<u>0.03%</u>	<u>0</u>
Managed Assets	\$98,343,199	<u>100.00%</u>	\$120,699,608	<u>100.00%</u>	\$22,356,409
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	2,756,570		3,411,750		655,179
Funds Held and Invested for Benefit of Federation or Its Agencies:					
Jewish Federation Reserve Funds	(2,858,394)		(3,328,196)		(469,801)
Custodial Funds	<u>(10,543,821)</u>		<u>(13,270,864)</u>		<u>(2,727,043)</u>
Total Assets	<u>\$87,697,554</u>		<u>\$107,512,298</u>		<u>\$19,814,744</u>
FUND BALANCES					
Restricted or Designated Endowments	\$52,891,842	60.31%	\$64,789,502	60.26%	\$11,897,660
Donor-Advised Funds	27,031,998	30.82%	32,754,963	30.47%	5,722,964
Unrestricted Endowments	4,864,617	5.56%	6,368,859	5.93%	1,504,243
Supporting Foundation (Pardes Foundation)	152,527	0.17%	187,224	0.17%	34,698
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	<u>2,756,570</u>	<u>3.14%</u>	<u>3,411,750</u>	<u>3.17%</u>	<u>655,179</u>
Total Fund Balances	<u>\$87,697,554</u>	<u>100.00%</u>	<u>\$107,512,298</u>	<u>100.00%</u>	<u>\$19,814,744</u>



Statement of Support, Revenue, Allocations and Expenses

July 1, 2020 - June 30, 2021

Beginning Fund Balances - 07-01-20	<u>\$87,697,554</u>
Lifetime Gifts and Contributions	5,683,431
Investment Income	20,070,975
Grants and Allocations	(5,269,089)
Beneficiary Income Payments	(150,241)
Foundation Office Expense	<u>(520,332)</u>
Net Change in Fund Balances	<u>19,814,744</u>
Ending Fund Balances - 06-30-21	<u>\$107,512,298</u>

Jewish Federation of Omaha Foundation Financial Highlights as of June 30, 2021

A - Summary of fiscal year activity for all funds*

Current value of funds	\$120,699,608
Current number of funds	650
Current number of donor-advised funds	137
Current number of Young Jewish Giving funds	126
Current number of endowment funds	387
Number of new funds in 2020-2021 (includes 5 new Young Jewish Giving funds)	23

Change in funds from June 30, 2020 to present:

New contributions	\$5,683,431
Investment performance	20,070,975
Grants & Distributions	(5,269,089)
Other	<u>(670,573)</u>
Total	<u>\$19,814,744</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 2021	\$109.1
1 Year Ago	June 2020	93.3
3 Years Ago	June 2018	83.6
5 Years Ago	June 2016	65.7
<hr/>		
Total Investment Return - 1 Year		22.70%
Total Investment Return - 3 Years		9.61%
Total Investment Return - 5 Years		8.87%

**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.

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.



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

- **Website** - Visit our website (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 2021 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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DIRECTORS

JULY 1, 2020 - JUNE 30, 2021



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Norman Veitzer

Thank You

The Foundation board and staff would like to extend sincere thanks to Norman Veitzer for his dedication as a founding member of the Foundation Board, serving from 1983-2021 and presiding from 1992-1994.