



THE FOUNDATION

*Assuring a solid future for the
Omaha Jewish Community*



JEWISH FEDERATION OF OMAHA
FOUNDATION





“THE FOUNDATION stands strong and proud today because of the “compassionate actions” of our donors. Their generosity has provided care for our seniors, opportunities for our youth and every communal need in between. Effective philanthropy — strategic, long-term and ongoing financial support — is what continues to provide a solid and bright Jewish future for generations to come.”

Amy Bernstein Shivvers, Executive Director
JEWISH FEDERATION OF OMAHA FOUNDATION



THE MISSION OF THE 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.

“THE GREATNESS OF A COMMUNITY
is most accurately measured by the
compassionate actions of its members.”

- CORETTA SCOTT KING



FROM GENERATION TO GENERATION

**“WE ARE PART OF SOMETHING SO
MUCH BIGGER THAN OURSELVES...”**

a ‘tribe of wanderers’ working to do good, build communities and provide help to those who need it most. The ultimate goal is to assure a solid Jewish future for ourselves and our families, writing the next chapter of our shared legacy and doing it with foresight, compassion and the knowledge that our work is sacred.”

Bob Goldberg, CEO
JEWISH FEDERATION OF OMAHA



What's important to you?

Charitable giving begins with the heart. What do you care most about? When it comes to our Jewish community, where do you feel the need is greatest? There are no right or wrong answers. Yours are the only ones that count. Take some time to look over the list below, then set up an appointment at THE FOUNDATION where *your priorities will become our priorities.*

JEWISH POPULATIONS

Preschoolers
Youth groups
College bound teens
Young professionals
The elderly
Low income
Athletes
Special needs children/adults
Teachers
Clergy
Jewish professionals
Immigrants
Refugees

INSTITUTIONS

Jewish Federation of Omaha
Beth El Synagogue
Beth Israel Synagogue
Temple Israel
B'nai Israel Living History Synagogue
Chabad of Nebraska
Friedel Jewish Academy
Pennie Z. Davis Early Learning Center
Jewish Senior Outreach
Jewish Family Service
Rose Blumkin Jewish Home
Institute for Holocaust Education
Schwalb Center for Israel & Jewish Studies
League of Volunteers for the Elderly (L.O.V.E.)
Nebraska Jewish Historical Society (NJHS)
B'nai B'rith Youth Organization
Staenberg Omaha JCC
Alan J. Levine Performing Arts Theater
Jewish Community Relations Council
Jewish Press
Jewish hospitals
Jewish summer camps
B'nai B'rith
Tri-Faith Initiative

CAUSES

Mental health
Jewish genetic diseases
Community safety/security
Hunger and food insecurity
Suicide Prevention
Anti-Semitism/Discrimination
Cultural Arts
Jewish education/schools
Women's Rights
Anti-Bullying
Scholarships
Gender Equality

PLACES

Israel
Council Bluffs Jewish community
Lincoln Jewish community
Hometown Jewish community
A community in crisis

VALUES

Mitzvot
Tzedakah
Tikkun Olam
Social Justice
Jewish traditions
Jewish holidays
Acts of lovingkindness
Caring for the stranger
Torah study
Preserving our history
Telling our stories
Our legacy

Funding Opportunities

ENDOWMENT FUNDS

allow you to give a gift of cash or appreciated assets (securities and real estate) to establish an endowment at THE FOUNDATION. Designate the Federation or your favorite Omaha-area Jewish charitable organization or program to receive distributions annually.

"We are honored to carry on our family's legacy through the Lazier L. and Harriet B. Singer Memorial Fund for Youth. Now more than ever, it's essential we support the children of the Omaha Jewish community and help them address the many challenging issues they face in today's world."

SANDY AND STUART KUTLER &
MARK SINGER

DONOR-ADVISED FUNDS

are simple, tax-smart investment opportunities for charitable giving. It works like a personal, charitable checking account at THE FOUNDATION. You contribute cash, securities or other appreciated assets; you may be eligible for a current year tax deduction, and you can be more strategic about your giving decisions. You recommend all distributions during your lifetime and leave the remainder to your children, grandchildren or to THE FOUNDATION for distribution after your death as part of your legacy.

"For as little as \$2,500, you can open a Donor-Advised Fund. It's an efficient and time-saving way to make campaign gifts and donations in the Jewish or general community."

JEFF KIRSCHENBAUM

SUPPORTING FOUNDATIONS

are separate legal entities with a separate board created by you and your family. The Supporting Foundation then partners with THE FOUNDATION that invests the funds, manages the operations and makes disbursements as directed from time to time by the Supporting Foundation.

"The Goldstein Supporting Foundation enables our Board to honor the wishes of Buddy and Shirley Goldstein to fund projects and causes that are in line with our Mission Statement such as Human Rights, Jewish Omaha and kidney disease. Our Foundation also continues to support organizations that worked in partnership with Buddy and Shirley to fulfill mutual goals."

DONALD GOLDSTEIN

We can make what's important to you last forever.

More Ways to Give!

CASH, APPRECIATED SECURITIES, REAL ESTATE AND OTHER ASSETS

Donate any of these assets and reduce your income tax liability while achieving your charitable goals.

A BEQUEST

Designate THE FOUNDATION as a beneficiary in your will.

CHARITABLE GIFT ANNUITY

Increase your cash flow with a gift that provides guaranteed fixed payments for life at rates considerably higher than low-earning CD's and a charitable income tax deduction.

CHARITABLE LEAD TRUST

A tax advantageous legally binding agreement that puts assets into a charitable trust. Trust income goes to THE FOUNDATION for a number of years, after which the remainder transfers to family members of your choice.

CHARITABLE REMAINDER TRUST

A tax advantageous, legally binding agreement that puts assets into a charitable trust. This method gives you or family members income for life or for a designated number of years. Thereafter, the remaining assets go to THE FOUNDATION to benefit a cause you hold dear.

FAMILY BUSINESS STOCK

When you're ready to sell or transfer your business, there are charitable tax benefits if you include THE FOUNDATION in the transaction.



FROM GENERATION TO GENERATION

LIFE INSURANCE

Set up a new life insurance policy with THE FOUNDATION as owner and beneficiary. Make tax deductible contributions to THE FOUNDATION which will pay the annual premiums. You could also designate THE FOUNDATION as beneficiary of your current life insurance policy. You continue to own the policy during your lifetime; after your death, the estate would benefit from an estate tax charitable deduction for the value of the gift to THE FOUNDATION.

LIVING TRUST

Name THE FOUNDATION as a beneficiary of your Living Trust.

RETIREMENT ASSETS

IRA, 401(k), 403(b)
Name THE FOUNDATION as a beneficiary of your qualified retirement plan. Your children might have to pay significant income and estate taxes if they inherit retirement assets. However, those assets will pass tax free if left to THE FOUNDATION.



Why THE FOUNDATION?

Our first priority is to **meet the needs of the Omaha Jewish Community.**

The goal is to **remain a vibrant and secure** Jewish community.

We are proud to be part of the **next generation** to *advance* the community.

We **maximize your resources** to *benefit* the community.

We share the **same goals.**

Our skilled professionals provide **personalized service** in a Jewish setting.

We offer the **highest standard of service** and a **low fee structure.**

You decide what's important and we manage the process.

Your priorities become our priorities.

MAKE A GIFT NOW AND ENJOY IMMEDIATE TAX BENEFITS,

avoid capital gains taxes and save on the expenses of maintaining assets you no longer need.

DEFER A GIFT FOR AFTER YOUR LIFETIME AND MAINTAIN YOUR CURRENT LIFESTYLE,

have the flexibility to change your plans as life changes, and transfer your retirement assets or other assets as a charitable donation tax free.

The Jewish Federation of Omaha Foundation is a sound financial institution with an impressive track record.

JOIN US!

For more information, contact
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FROM GENERATION TO GENERATION

This information is not intended as tax, legal or financial advice. Please consult your financial advisor for information specific to your situation.



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