



**WE STAND
WITH ISRAEL**



**SCAN QR CODE
TO DONATE TO THE
ISRAEL EMERGENCY FUND**

Individuals pictured in this
Annual Report are not necessarily
recipients of Foundation grants.
Photos taken at programs and
activities have received funding
from The Foundation.

Photo credit: Debra Kaplan
for *Fabulous at 40!* events

**JEWISH FEDERATION OF OMAHA
FOUNDATION**

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.

TABLE OF CONTENTS

Message from the Executive Director.....	3	Robert L. Weinstein.....	20
Message from the President.....	4	Bob Newman.....	21
Fabulous at 40! Highlights.....	5	Omaha Jewish Alumni Association.....	22
Forty Years & Counting.....	6-7	LIFE & LEGACY™ Program.....	23-25
Total Distributions.....	8-9	Jeanne Blacker Lipsey Rosenblum.....	26
Volunteer of the Year.....	10	Sarah Seldin.....	27
Endowment and Custodial Funds.....	11-17	Financial Overview.....	28-29
Gifts that Mature in the Future.....	17	Opportunity Knocks.....	30
In Memory of 2022-2023 Donors.....	17	Foundation Staff.....	31
Foevers Gifts - PACE/LOJE.....	18-19	Board of Directors.....	32

A MESSAGE FROM THE EXECUTIVE DIRECTOR

This is my first annual message to you as Executive Director of the Jewish Federation of Omaha Foundation. As you can tell from this year's annual report cover, the year has been dedicated to the celebration of The Foundation's 40th Anniversary.

One of the highlights of our anniversary celebration was the creation of a compelling video, *The Foundation Story*, that beautifully captures The Foundation's journey, spotlighting our dedicated donors and the profound impact that our grants have on the community. This video has allowed us to share our story widely and showcase the meaningful work we do together. You can open your camera and position it over the QR code on page 5 to view our story.

Our calendar of events was equally impactful. The "Hats Off to You" donor reception held at the Samuel Bak Museum saw the enthusiastic participation of 100 guests, a heartwarming testament to the strong community spirit we have fostered. At the JFO's Annual Meeting and Awards Night, we had the honor of celebrating Murray Newman's achievements and sharing our inspiring video, with over 200 guests.

The festivities continued with the "Summer Camp Reunion" at Sonny's, complete with a camp sing-along that brought back cherished memories and strengthened the bonds within our community. July's "With Heart in Hand" event witnessed a thoughtful conversation with our Rabbis on the profound meaning of *tzedakah*, drawing in engaged participants. This has been a highlight of the celebration!

In August, the film premiere of "Who Are the Marcuses?" was met with resounding success, featuring a fireside chat with Ellen Marcus and the director. In late August, "Living Legacy Workshop: Family Portraits of Giving" inspired parents and children to create an art collage keepsake. Our capstone event, "All in the

Family," featured three generations from three different families, each sharing their multigenerational philanthropy stories of giving back with time, talent and dollars.

The Fabulous at 40! celebration has been truly comprehensive. Our endeavors were accompanied by a new brochure (QR code on page 7), celebratory t-shirts for event attendees, illuminating *Jewish Press* articles, including the Rosh Hashanah issue dedicated to The Foundation. Over 30 articles documenting our remarkable history to the present.

This is an amazing community! With your support, we have achieved an extraordinary celebration, setting the stage for the next 40 years of meaningful impact and growth. Your involvement has been instrumental, and we are profoundly grateful for your commitment to our shared vision.

Thank you for your contribution to this momentous occasion, which has not only allowed us to honor our past but has also ignited the spark for an inspiring future.

Charitable giving begins when you care deeply about something. Please let me know what is important to you. Your priorities become our priorities.

With heartfelt appreciation,

Amy Bernstein Shivers

Amy Bernstein Shivers
Executive Director



Amy Bernstein
Shivers



A MESSAGE FROM THE PRESIDENT



Bob Belgrade

The primary objective of the Jewish Federation of Omaha Foundation is to “serve the Omaha Jewish community.”

We achieve this by preserving and endowing funds for our donors, faithfully following their specified guidelines for the intended use of those funds.

The Foundation is able to provide the necessary tools for individuals to make charitable contributions and assist them in realizing their philanthropic intentions.

The Foundation itself does not direct or decide where donated funds are spent. The decisions regarding where the donated funds are allocated are entirely in the hands of the donors. It is their choices and instructions that we honor and follow.

Philanthropy is driven by a multitude of motivations, whether it's a matter of the heart, estate planning, or even tax considerations. Frequently, it encompasses all of these factors simultaneously. It is essential to recognize not only what philanthropy means to the community but also to understand its significance for the donors, especially when we evaluate the tangible goals achieved.

As The Foundation is now celebrating its 40th anniversary, we are very grateful for the continuing vision and leadership of previous and our present board members and staff that have guided us to help solidify our Jewish community and its organizations.

We express our heartfelt gratitude to you for entrusting The Foundation with your charitable giving. Your philanthropy has a tangible and lasting impact on people's lives today and extends its positive influence far into the future.

Thank you for your continued support!

A handwritten signature in dark ink that reads "Bob Belgrade". The signature is fluid and cursive.

Bob Belgrade
Board President



Fabulous AT 40!

GATHER

INSPIRE

CELEBRATE

We express our heartfelt gratitude for your support of The Foundation's remarkable 40th Anniversary celebration. We have received praise from numerous community members who attended our programs, gained inspiration from The Foundation Story video, and now have a deeper understanding of The Foundation's work and its impact.

A special thank you to our grant supporters who played a pivotal role in helping The Foundation mark this 40th milestone:

Anything Grants, Foundation Grants Committee - Foundation IMPACT Grants, Shirley & Leonard Goldstein Supporting Foundation, Herbert Goldsten Trust, Milton S. & Corinne N. Livingston Foundation Fund, Murray H. & Sharee C. Newman Supporting Foundation, and the Special Donor-Advised Fund. And to Debra Kaplan who captured every celebration with her camera and heart.



Scan the QR code to view "The Foundation Story," a video that beautifully captures our journey, highlighting our donors and the profound impact our grants have on the community.



Living Legacy Workshop: Family Portraits of Giving
Family created legacy montages



"Who are the Marcuses?"

Film premiere followed by panel discussion



With Heart in Hand
Conversations with Rabbis on Tzedakah



Hats Off to You
Donor Reception at the Samuel Bak Museum



Camp Sing-a-long
Summer Camp Reunion at Sonny's



All in the Family
Multigenerational Jewish stories & Jewish values



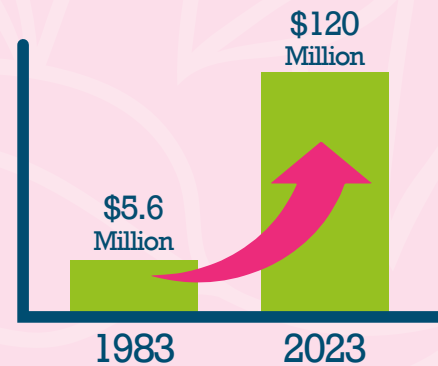
40 JEWISH FEDERATION OF OMAHA FOUNDATION

FORTY YEARS AND COUNTING



TOTAL MANAGED ASSETS

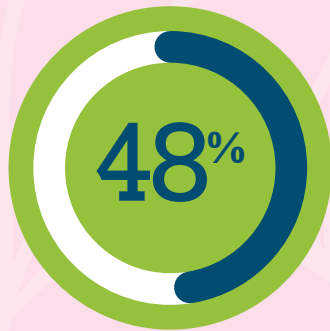
\$120 Million



THE FOUNDATION HAS GROWN FROM \$5.6 MILLION IN 1983 TO \$120 MILLION TOTAL MANAGED ASSETS BY 2023.



AVERAGE INCREASE IN ASSETS



EVERY
5 YEARS

TO SUPPORT
THE CAUSES
YOU CARE
ABOUT!

\$152,000,000

DISTRIBUTING 40+ YEARS

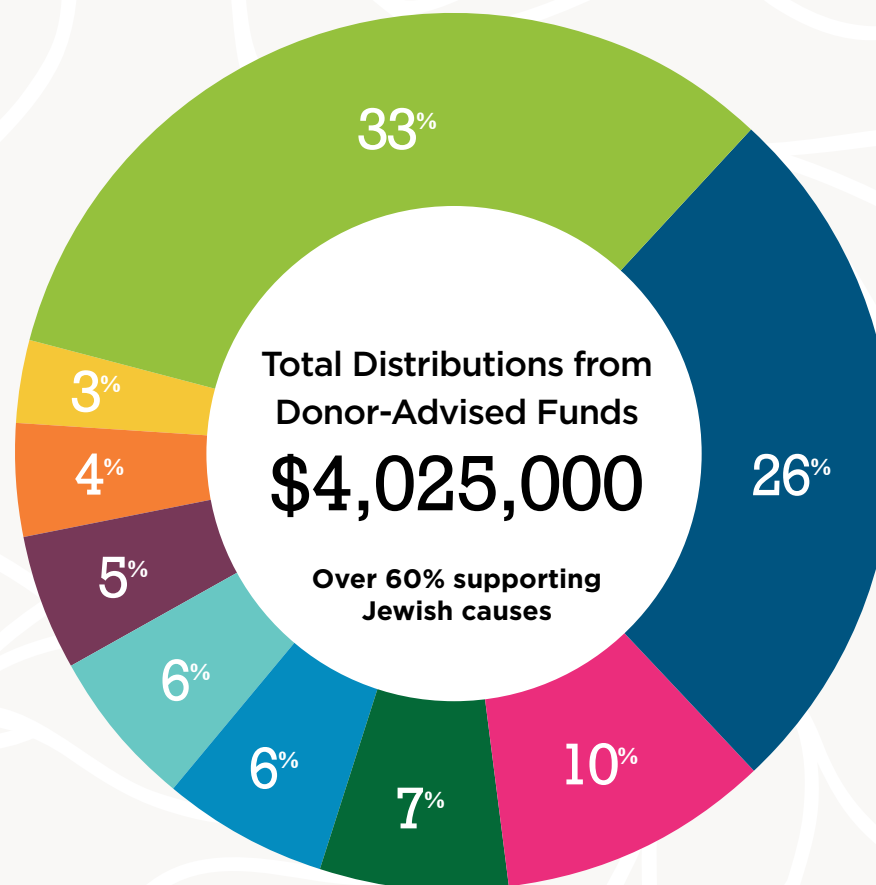
IN 1983, THE FOUNDATION MANAGED 68 FUNDS.
IN 2023, THE FOUNDATION MANAGES 687 FUNDS.



SCAN QR CODE TO LEARN HOW WE
ARE ASSURING A SOLID FUTURE FOR
THE OMAHA JEWISH COMMUNITY

DONOR-ADVISED FUNDS 2022-2023 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.

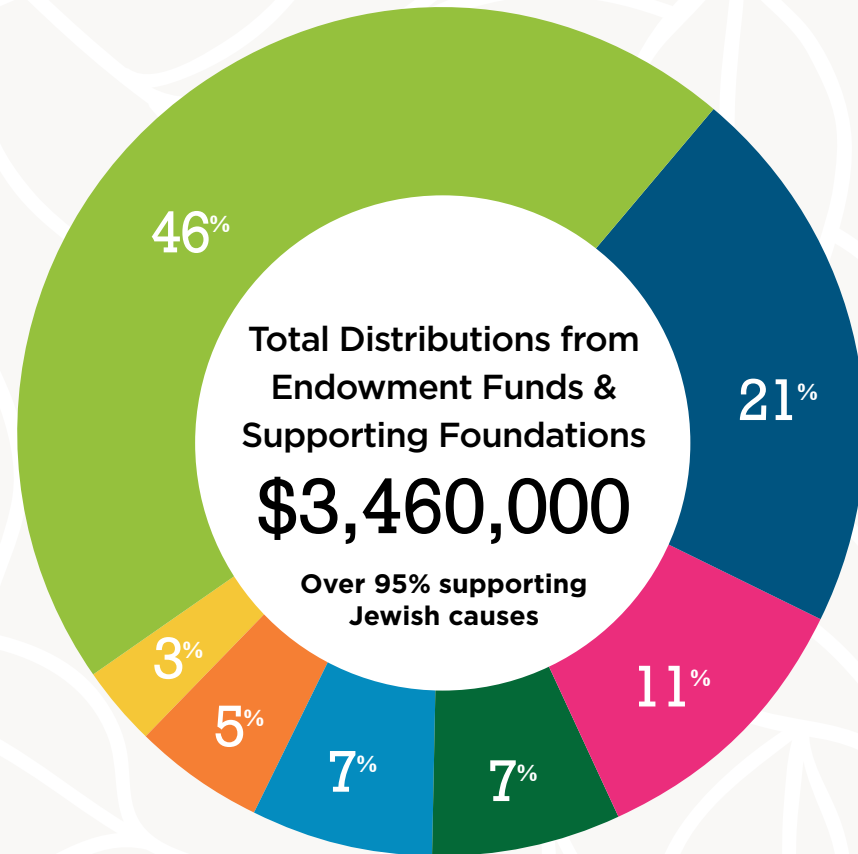


33%	Local Secular Organizations	\$1,322,000
26%	JFO Annual Campaign	1,030,000
10%	Campus Building Campaigns (JFO & RBJH)	394,000
7%	Local Synagogues	300,000
6%	National Secular Organizations	231,000

6%	National Jewish Organizations	231,000
5%	Internal Donations to Foundation Funds	212,000
4%	Local Federation Agencies	173,000
3%	Local Jewish Organizations	132,000

ENDOWMENT FUNDS 2022-2023 FISCAL YEAR

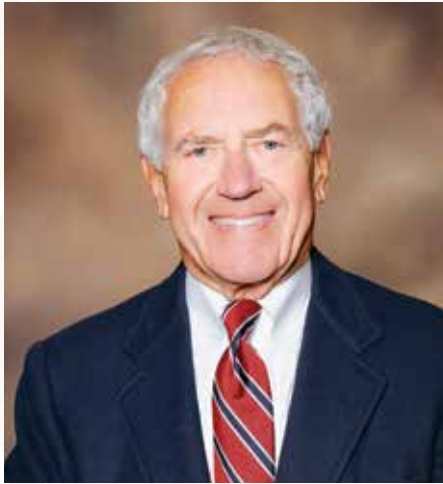
An Endowment Fund or a Supporting Foundation established with the Jewish Federation of Omaha Foundation allows you to create a permanent legacy and support the causes within the Jewish community that mean the most to you. Disbursements from these funds support the Jewish Federation and its agencies, Omaha area synagogues and other local Jewish organizations, such as Friedel Jewish Academy and the Nebraska Jewish Historical Society.



46%	Jewish Social Services (RBJH/JSO/JFS)	\$1,622,000
21%	JFO Annual Campaign & Operating Income	713,000
11%	Scholarships	374,000
7%	Local Jewish Organizations	240,000

7%	JFO Agency Programming	240,000
5%	Outside Organizations	161,000
3%	JCC Programs	110,000

MURRAY NEWMAN – THE FOUNDATION’S VOLUNTEER OF THE YEAR



Murray Newman

The Jewish Federation of Omaha Foundation nominated Murray Newman as its first-ever Volunteer of the Year. “Whenever you think of the cornerstone families,” Executive Director Amy Bernstein Shivers said, “those who have played a major role in building the Omaha Jewish community, you’ll find the name ‘Newman.’ Inspired by father Jule, Murray Newman has been a vital and influential community leader for decades.”

A founding member of the JFO Foundation Board and having served as its Chair, his extensive knowledge, intelligence, investment expertise and sound advice have been invaluable. In 2009, Murray and his wife Sharee were named Humanitarians of the Year by the Jewish Federation of Omaha, noting his genuine passion to make this community strong, maintain what has already been built and always with an eye on the future. Murray shows up every day with his time, talent and financial support.

Murray continues to be engaged and active on the Jewish Federation of Omaha Foundation Board and its Investment Committee (he was the Committee Chair from 2003 to 2022).

“We are all truly grateful for your loyalty, commitment and service in every facet of our Jewish community. Thank you, Murray!”

- AMY BERNSTEIN SHIVERS

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
- Jeanne **Lipsey Rosenblum** Jewish Press Endowment

- Ted and Dorothy **Blacker Rothkop** Endowment
- Phyllis and Irvin **Sherman** Family Endowment
- Judith A. and Gerald B. **Simons** Endowment
- Maxine and Milton **Simons** Endowment
- **Staenberg** Federation Endowment
- 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
- Marilyn T. **Kaplan** Fund
- 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
- Kevee **Kirshenbaum** LIFE & LEGACY Endowment
- Murray H. and Sharee C. **Newman** RBJH Selective Endowment Fund
- Irvin & Suzanne **Richards Singer** 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
- Omaha Early Childhood Jewish Learning Grants Fund

JCC PROGRAMMING & OTHER PURPOSES

- Al **Clayman** Memorial Endowment
- Arthur H. and Ruth M. **Goldstein** Family Endowment
- Bucky **Greenberg** Aquatic Endowment
- Fran and Rich **Juro** Endowment Fund for the Federation
- 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. **Perlmeter** 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
- 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
- **Perlmeter** 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
- Alan J. **Levine** Building 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 and 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
- Joseph and Maxine **Kirshenbaum** Camp Scholarship Fund
- 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
- 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
- Jewish Federation of Lincoln Judge Ben **Novicoff** Scholarship Fund
- 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
- **Riekes** Family Jewish Youth Educational 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
- Robert L. **Weinstein** JCC ELC Scholarship Endowment
- Edward **Zorinsky** Endowment
- CornerStones Fund
- Pay It Forward Endowment

ESTABLISHED FUNDS DESIGNATED FOR THE JEWISH FEDERATION ANNUAL CAMPAIGN

- Norman B. and Frances P. **Batt** PACE Fund
- Robert **Belgrade** PACE Fund
- Sandra **Belgrade** LOJE Fund
- Herbert M. **Berkowitz** Memorial PACE Fund
- Dr. Mark **Brodkey** PACE Fund
- Leo and Aileen **Eisenstatt** PACE/LOJE Fund
- Joanne and Jerry **Freeman** PACE 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
- Fran and Rich **Juro** Endowment Fund for the Federation
- Marcel and Ilse **Kahn** PACE Fund
- Forrest Nathan and Lisa **Stewart Krutter** PACE Fund
- Steven and Bonnie **Levinger** PACE Fund
- Milton S. and Corinne N. **Livingston** PACE Fund
- Dr. Sidney **Mirvish** Memorial PACE Fund
- Bettie and Stuart **Muskin** PACE Fund
- E. Robert and Phyllis H. **Newman** PACE Fund
- Murray H. **Newman** PACE Fund



- Sharee C. **Newman** LOJE Fund
- Ellie **Penner** PACE Fund
- Iris J. and Martin C. **Ricks** PACE Fund
- Henry and Dorothy **Riekes** Endowment
- Janice **Schneiderman** LOJE Fund
- Beverly K. and Millard R. **Seldin** Endowment
- Lorraine **Silverman** Annual Campaign Endowment
- Phil and Ruth **Sokolof** Honor Roll Fund
- Cari **Sommer** Memorial LOJE Fund
- Special Donor-Advised Fund
- Maurice and Joan **Udes** PACE Fund
- Norman and Joodi **Veitzer** Fund

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 **Stenberg** 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 benefitting one sole partner listed in respective category.)

- Sandra **Belgrade** LIFE & LEGACY Endowment
- Elliot **Brown** 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

MULTI-PURPOSE FUNDS & OTHER

- Jane H. and Rabbi Sidney H. **Brooks** Conversations for Change Series Endowment Fund
- 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 Hastings, NE
- Alan J. **Levine** Program Endowment
- **Lieberman** Family Scholarship for Scottsbluff High School Endowment
- **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

- Mickey & Fran **Coren** Family Fund 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
- Alan M. **Rosen** Theater Maintenance Endowment for the Jewish Federation of Omaha
- Carol and Edward **Schneider** Legacy Endowment for the Jewish Federation of Omaha
- Lazier L. and Harriet B. **Singer** Memorial Youth Endowment for the JFO

SUPPORT FOR PARTNERS / AFFILIATES / OTHER ORGANIZATIONS

JEWISH COMMUNITY RELATIONS COUNCIL

- Barton (Bucky) **Greenberg** and Caryl **Greenberg** JCRC Memorial Social Justice Scholarship Fund
- Beatrice **Karp** LIFE & LEGACY Fund for the JCRC
- Jule M. **Newman** Memorial Anti-Bigotry Endowment
- Jewish Community Allyship Fund
- JCRC 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
- B'nai Israel Synagogue LIFE & LEGACY Endowment

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 Associate 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
- **Staenberg** Family Holocaust Education Scholars Program Fund
- Walter & Helena **Tichauer** Memorial Endowment for the Institute of Holocaust Education
- Institute for Holocaust Education Endowment 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. **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

- Joanne and 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

IN BLESSED MEMORY OF FOUNDATION DONORS IN 2022-2023

(July 1, 2022 – June 30, 2023)

Irving Epstein

Barry E. Epstein Memorial Healthcare Endowment
Irving and Geri Epstein Chabad LIFE & LEGACY Endowment

Irving and Geri Epstein Beth Israel LIFE & LEGACY Endowment

Jerome and Linda Gordman

Dan and Esther Gordman Jewish Education Fund

Nancy Hornstein

Bennett G. Hornstein Endowment Fund

Arthur Jacobs

Adam Jacobs Memorial Tribute Scholarship Fund
from B'nai B'rith

Howard Kaiman

Samuel & Ida Kaiman Endowment

Marcia Lipsman

Harvey & Marcia Lipsman JCC Youth Endowment

E. Robert Newman

E. Robert & Phyllis H. Newman PACE Fund
Phyllis H. & E. Robert Newman Endowment
Jule M. Newman Memorial Anti-Bigotry Endowment Fund

Jeanne Lipsey Rosenblum

Jeanne Lipsey Rosenblum Jewish Press Endowment

Sarah Seldin

Ted & Sarah Seldin Family RBJH Activities Endowment
Ted & Sarah Seldin LIFE & LEGACY Endowment

Robert Weinstein

Robert L. Weinstein JCC ELC Scholarship Fund

LIFE & LEGACY

Irving Epstein

Arlene Fredricks

Jerome Gordman

Linda Gordman

E. Robert Newman

Sarah Seldin

FOREVER *Gifts*



Bonnie and Steve Levinger
with their grandchildren

Forever Annual Campaign Gifts are permanent funds established during or after your lifetime and dedicated to endowing your Jewish Federation of Omaha Annual Campaign gift in perpetuity.

There are two kinds of Forever Annual Campaign Gifts: The PACE (*Perpetual Annual Campaign Endowment*) and LOJE (*Lion of Judah Endowment*). The required amount for both endowments is 25x the amount you intend to give every year, after lifetime. For Lion of Judah, the Annual Campaign gift is \$5,000 or higher so a woman would establish a fund of at least \$125,000 to ensure the perpetuation of her Lion of Judah giving level. The Foundation invests the funds and the income grows tax-free with both endowments. Currently, The Foundation manages 40 of these endowments and has 35 signed agreements to be funded in the future.

A highest form of tzedakah is giving to a central campaign or community fund. This gift is a noble expression of devotion to the entire Jewish people and each member of the community contributing in this way, increases the impact to the community. Your contributions feed needy Jewish families, fund scholarships for Jewish children to attend Jewish day camps, connects Jewish Nebraskans to Israel, provides support for seniors in need, and so much more!

Roughly \$275,000 of our Annual Campaign is from Forever Gifts – that’s just 8% based on \$3.4 million total campaign income.

Our community goal is for 30% of the Annual Campaign gifts, about \$1 million, to come from Forever Annual Campaign Gifts in the next five years. We thank these donors for paving the way.

LION OF JUDAH ENDOWMENT DONORS

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



Sandy Epstein with her grandchildren

PERPETUAL ANNUAL CAMPAIGN ENDOWMENT DONORS

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

"We love Omaha's Jewish community and want to secure its future by supporting the Federation's Annual Campaign for generations to come. So, Paul and I named The Foundation as beneficiary of an IRA to endow our PACE and LOJE funds that will provide for our gifts to the Annual Campaign year after year."

- SANDY EPSTEIN

**Of blessed memory*

ROBERT L. WEINSTEIN JEWISH COMMUNITY EARLY LEARNING CENTER SCHOLARSHIP ENDOWMENT FUND



Robert L. Weinstein

Robert L. Weinstein passed away on Nov. 11, 2022, at age 76 in Boca Raton, Florida. He was preceded in death by his parents, Herman and Shirley Weinstein.

Robert was born July 8, 1945, in Omaha and he received his B.A. from Oklahoma University and his J.D. from Creighton University. The majority of his professional career was spent building a successful office furniture manufacturing business.

Robert had solid roots in Omaha, his birthplace. In an article published in *The Jewish Press* in 2014, Robert shared, "I'm a nostalgic person about the past, and I have many fond memories of growing up in Omaha - Omaha is my home." Robert lived near 49th and Cass and then the 'Old Bagel' neighborhood," he recalled. "I have fond memories of my Bar Mitzvah by Rabbi Myer Kripke at Beth El. I participated in USY and AZA, enjoyed going to the old Jewish Community Center, and attended camps through the JCC. My time at Camp Herzl reinforced my connection to Judaism."

Weinstein's connections to Omaha led him to arrange for the Robert L. Weinstein Jewish Community Center Early Learning Center Scholarship Endowment Fund. This fund is now active and assists

Jewish families from the Omaha metropolitan area who require financial assistance or scholarships to enable their children to enroll in either childcare or the pre-school program provided through the Pennie Z. Davis Early Learning Center.

Robert's gift will leave a lasting legacy that will significantly impact Omaha's Jewish families for years to come. We are very grateful Robert was part of the Omaha Jewish Community and that the community and its children held a very special place in his heart during all the years he lived elsewhere. Omaha was truly his home.

"If I can help some hard-working families in Omaha who can't afford to send their children to the ELC, then my future endowment fund will help them. I want every child to get a good (Jewish) start."

- ROBERT WEINSTEIN



REMEMBERING BOB NEWMAN

Bob Newman was a man who led by example, his family remembers. He didn't do his volunteer work at the Anti-Defamation League and Jewish Federation of Omaha for recognition, he did it because it was important. He was religious about this work, and considered it his obligation to the community.

Edwin Robert "Bob" Newman, age 93, passed away peacefully on February 3, 2023, surrounded by family. He was born February 5, 1929, in Omaha, Nebraska, to Jule M. and Esther K. Newman. He graduated from Omaha Central High School in 1946. He earned a Bachelor of Civil Engineering at Stanford University in 1950.

Bob's interests were varied: combining the intellectual and the artistic, where math and engineering coexisted with a love of music and museums. In his 80s he took up the piano again; he gave recitals well into his 90s.

After Bob returned from service in the United States Air Force he began working alongside his father, uncles, and brothers, in the family business, Hinky Dinky grocery stores. He helped lead Hinky Dinky to much success. He began as manager in its store planning and construction department, but had numerous different roles during his 22 years with the company. He was Chairman of the Board for his final 12 years with the firm. At its peak, Hinky Dinky had 18 stores in Omaha, three in Lincoln, four in Des Moines and about 15 in smaller towns.

After Hinky Dinky, he earned his law degree from Creighton University in 1979 and practiced patent, trademark, copyright and trade secret law, first as an associate, then as a partner in the law firm of Henderson and Sturm.

Bob was devoted to the idea of Tzedakah, the Jewish moral obligation to justice and philanthropy. The Anti-Defamation League, the Jewish Federation of Omaha, Temple Israel of Omaha, and the Southern Poverty Law Center were close to Bob's heart.

Bob partnered with the Jewish Federation of Omaha Foundation for his charitable giving, including his LIFE & LEGACY commitment, the E. Robert & Phillis H. Newman Perpetual Annual Campaign Endowment and the Phyllis H. & E. Robert Newman Endowment Fund.



Bob Newman

**Bob truly lived his life to the fullest, and he will be missed.
May his memory be for a blessing.**



OMAHA JEWISH ALUMNI ASSOCIATION ANNUAL REPORT 2023

The Omaha Jewish Alumni Association hosted our THIRD reunion! Following successful reunions in Scottsdale and Dallas, we couldn't have been more excited for our Kansas City Reunion Brunch.

The mission of OJAA 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 vision for the OJAA has been the inspiration of our generous donors, Lisa and Gary Epstein.

On Sunday, October 22, the Omaha Jewish Alumni Association (OJAA) along with the Jewish Federation of Omaha Foundation, sponsored brunch in Kansas City at the home of Michael and Lindsay Fineman. It was wonderful bringing together current and former Omahans to catch up and connect and we were excited to bring a snapshot of Omaha to Kansas City, to keep everyone in the loop!

Our brunch hosts were Erin (Malashock) and Aaron Berger, Hollie and Glen Fineman, Lindsay and Michael Fineman, Margie and Bruce Gutnick, Julie (Gutnik) and Michael Levine, Jody and Buzz Malashock, and Annie Rifkin.

We are thrilled to see the continued success of the OJAA, and the opportunities that OJAA members continue to have to reconnect.

Are your Jewish roots here? Contact Stacie Metz to join our growing OJAA community at 402-334-6485, smetz@jewishomaha.org.



Gary Epstein, Justin and Jenifer Spiegel



Ellie Penner, Jody and Buzz Malashock



Amy Bernstein Shivers, Lindsay Fineman, Erin Berger



“Our OJAA in Kansas City were delighted to see Omaha reaching out to them. They were very impressed with how Jewish Omaha was engaged to keep our close connections and hopefully lead to more larger reunions in the future.”

- GARY AND LISA EPSTEIN

LIFE & LEGACY™ ANNUAL REPORT 2023

LIFE & LEGACY™ is a means through which you can express your passion, purpose, and commitment to the future of Omaha's Jewish community and the organizations you value.

The Omaha Jewish community immediately embraced legacy giving. In our ninth year of the program, and have 680 commitments with an estimated value of \$25,525,442. Our community counts on the participation of each of us to sign a letter of intent and make a promise to give \$100, a percentage of your IRA, a bequest in your will, or a stock donation. Any and all gifts are welcome. Remember, the gift you pledge today does not impact your lifestyle; this is a legacy gift, received after your lifetime.

The Foundation has already received substantial gifts which benefit our participating organizations: The Jewish Federation of Omaha and its Agencies (Institute for Holocaust Education, Jewish Community Relations Council, Jewish Social Services, Nebraska Jewish Historical Society, Staenberg Omaha JCC, and The Jewish Press) as well as Beth El, B'nai Israel and Living History Museum, Beth Israel, Chabad, Friedel Jewish Academy, and Temple Israel.

LIFE & LEGACY does not just strengthen communities financially; it strengthens them socially. The initiative brings together organizations that previously saw each other as competitors. They become trusted partners who cooperate, share resources, learn from, support, and celebrate one another.

Legacy giving is becoming a social norm within individual communities, and it is the goal of LIFE & LEGACY to ensure it becomes normative donor behavior within all Jewish communities across North America. Many nonprofit Jewish organizations have been left in precarious financial positions due to the pandemic. Unfortunately, this is just the latest in a long list of disasters that have impacted society. We have faced hurricanes, floods, wildfires, shifting politics and the global financial collapse in 2007, and now the war in Israel. Organizations need a more robust solution to ensure their survival.

Leaving a LEGACY today you assure that the traditions and institutions that mean so much to you will exist for future generations. To learn more please contact me.



My best regards,

Stacie Metz
Program and Stewardship Administrator
402-334-6485
smetz@jewishomaha.org



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:



The Jewish Federation
OF OMAHA

And its Agencies:

Institute for Holocaust Education
Jewish Community Relations Council
Jewish Social Services
(Jewish Family Service, Jewish Senior Outreach, Rose Blumkin Jewish Home)
Nebraska Jewish Historical Society
Staenberg Omaha JCC
The Jewish Press



BETH EL
SYNAGOGUE



BETH ISRAEL
OMAHA NEBRASKA



Chabad
OF NEBRASKA



FRIEDEL
JEWISH ACADEMY



Temple Israel

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*
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*
Beth Cohen
David & Karla Cohen
Marla & Bob Cohen
Drs. Michael & Karen Cohen & Family
Daniel Cohn
Pam Cohn
Judith Cooper
Justin Cooper
Ronald & Cheryl Cooper
Mickey & Fran Coren
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
Robert & Andrea Erlich
Richard Evnen
James & Judy Farber
Yonatan & Liz Feldstern
Richard M. Fellman
Toby Fellman*
Cantor Leo* & Annette Fettman
Glen H. & Hollie Fineman
David Finkelstein
Rebecca Ruetsch Finkelstein
Alan J. Fredricks
Arlene Fredricks*
Jerry Freeman*
Joanne Freeman*
Robyn & Bob Freeman
Ted & Jamie Friedland
Bruce & Pam Friedlander
Amy & Sanford Friedman
Lloyd D. & Lois N. Friedman Trust
Steven M. Friedman
Lynne Friedel Gellman
Howard E. Gendelman
H. Lee & Carol Gendler Charitable Fund
Donald Gerber
Dan & Sarah Gilbert

David Gilinsky & Katherine Finnegan
Ronald Giller
Darlene & Sherman* Golbitz
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
Mary Sue Grossman
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
Patrick Jensen
Sylvia Jess*
Edward & Anne Joseph & Family
Debbi Josephson
Frances Juro
Richard Juro
Becky Kahn
Marcel & Ilse* Kahn

Mr. & Mrs. Stephen Kaniewski
Gary* & Sally Kaplan
Myron Kaplan
Russ Kaplan
Beatrice Karp*
Gloria C. Kaslow
Howard J. Kaslow
Cookie Katskee
Julee Katzman
Les & Helen Kay
Jeff & Sharon Kirshenbaum
Joe Kirshenbaum*
Kevee Kirshenbaum*
Donald S.* & Delores Klein
Marsha A. Kleinberg
Milton M. Kleinberg
Sara & Ari Kohen
David Kohll
Janet Kohll
Howard M. & Sharon Kooper
Shane & David Kotok
Jack Kozlen
Alan & Deborah Kricsfeld
Janie Fox Kulakofsky
David & Debi Kutler
Howard Kutler
Stuart & Sandy Kutler
K. Wayne & Carole A. Lainof
Randal Langdon
Sharon Comisar-Langdon
Barbara Lashinsky
Joanie Lehr
Sandy & John Lehr
Susan 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
 Chaya Sarah Malkah
Dan Marburg
Joan Krasne Marcus
 Lisa Marcus
Julie & Mark Martin
Bruce Meyers
Jon & Denise Meyers
Sue Meyers*
Tina & Joe Meyers
Robert Y. Meyerson, M.D.
Troy & Jamie Meyerson
Lois Milder
Dr. Sidney Mirvish*
Stanley & Evelyn Mitchell
Eli* & Ann* Modenstein
Ann Moskovits*
John Mosow & Ellin Siegel
Janie & Allan Murow
Alan & Linda Muskin
Mary-Beth & Bruce Muskin
Michael Muskin
 Amy Nachman
Gary Nachman
Allison Newfeld
Murray & Sharee Newman
Dr. Patricia Newman
Phyllis & E. R. "Bob"* Newman
Allan S. Noddle
Patty Nogg
Steve Nogg
Susan R. Norton
Andrea Olson
Alan S. Parsow
Carol S. Parsow

Margo Frohman Parsow
Robert* & Betty Perelman
Vicki Perlmeter
 Bonnie Pfrenger
Eric & Julie Phillips
Gilda Pieck*
Marcia & Steve* Pitlor
James & Susan Polack
Karen Pollak
Oliver Pollak
Alan E. Potash
 Bruce Potash
 Linda Neumann-Potash
Paul Rabinovitz
 David & Gretchen Radler
Gail Goldstein Raznick
Mary & Joel Rich
Philip & Diane Rich
Marty & Iris Ricks
 Ari Riekes
Carl Riekes
Margo Riekes
Steven J. Riekes
Zoë Riekes
Bob Rifkin
 Jane & Harlan Rips
Stuart Richard Rochman*
Jonathan Rockman
Stacey Rockman
Silvia G. Roffman
Debbie & Lloyd Roitstein
Susan Rothholz*
Lynne-Carol Saltzman
Rosalie* & Milton* Saylan
 Caryn & Marc Scheer
Dr. Joel & Nancy Schlessinger
Carol* & Ed Schneider
Beth and Harley Schrager
Jeffrey Schrager & Anne York Family
Foundation
Natan & Hannah Schwalb

Jeff Schweid
Aviva Segall & Patrick McNamara
Ted* & Sarah* Seldin
 Stephanie Shakhirev
 Mr. and Mrs. Ben Shapiro
Nate A. Shapiro
Sherry & Larry Shapiro
Len Burrell & Cantor Wendy Shermet
Melissa & Michael Shrago
Aveva & Martin Shukert
Gary Shyken
Liat Shyken
Paul Shyken
Susann Shyken
Michael & Andrea Siegel
Sissy Katelman Silber
Esther Silver
Denise C. Silverman
Stanley* & Norma* Silverman
Gerald & Judy Simons
Harriet Singer*
Nancy B. Skid
Janet & Jerry Slusky
Jeff & Debi Smedlund
Dorothy Spizman
Michael Staenberg
 Shira Steinberg
Carolyn "Rocky" Stern
 Rabbi A. Brian Stoller
David Keiser & Lillian Keiser Stoms Foundation
Louri Sullivan
Barry H. Summer
Fred Tichauer

Marilyn & Steven Tipp
Basya Tsed
R. Thomas Vann
Irving & Gail Veitzer
Norman & Joodi* Veitzer
John & Donna Walter
Jim & Esther* Wax
Steve & Joye Wees
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 17, 2023

Bolded – This means individual(s) have indicated to the Foundation they have formalized their commitment legally. If you have formalized, and are not bolded please contact Stacie Metz at smetz@jewishomaha.org or at 402.334.6485 to correct.

This is the year to establish your Legacy.

Contact the Jewish Federation of Omaha Foundation today!

Amy Bernstein Shivvers
 Executive Director
 402-334-6466
 ashivvers@jewishomaha.org

Stacie Metz
 LIFE & LEGACY Coordinator
 402-334-6485
 smetz@jewishomaha.org

JEANNE BLACKER LIPSEY ROSENBLUM



Jeanne Blacker Lipsey Rosenblum

Jeanne Blacker Lipsey Rosenblum was born in Omaha, NE on Jan. 19, 1928 and passed away on November 29, 2022.

She attended Central High School and later Northwestern University and UCLA. She married Stanford Lipsey from Omaha and they had two children, Janet and Daniel.

Her first love was her family and friends. Her roots in Omaha and the Jewish community were deep, strong and close to her heart. She was an active participant at Beth El Synagogue and chaired an Omaha Jewish Federation Annual Campaign. She continued her passion for philanthropy and volunteering throughout most of her life.

In Jeanne's memory, her family established the Jeanne Lipsey Rosenblum Jewish Press Endowment Fund to subsidize the daily operations and activities of *The Jewish Press*. Her late, first husband, Stan Lipsey, worked in the newspaper industry, including Sun Newspapers and the *Buffalo Evening News* where Stan became the publisher of the paper in 1983.

Jeanne was an exceptionally generous woman with her time, talent and treasure. Her afterlife gift will continue the legacy of giving that was such a major part of the Lipsey Rosenblum family. The Jewish Federation of Omaha Foundation is extremely thankful to Jeanne and Stan for their generosity to the Omaha community.

“When I think of Jeanne, I am reminded of how truly special our Jewish community is. The level of care and dedication of community members like her never ceases to amaze me, and we are so grateful!”

- ANNETTE VAN DE KAMP-WRIGHT

IN MEMORY OF SARAH SELDIN

Sarah Seldin passed away on August 23, 2022. She was preceded in death by her husband of 64 years, Ted Seldin.

In 2014, Sarah and Ted established the Ted and Sarah Seldin Family RBJH Activities Endowment Fund. This fund provides financial support for programs and activities for the benefit of the residents of the Rose Blumkin Jewish Home. The Ted and Sarah Seldin LIFE & LEGACY Endowment Fund was established in August 2021 in memory of Ted and in honor of Sarah with funds from the Theodore M. Seldin Charitable Remainder Trust. Throughout their lives Ted and Sarah were extremely generous in many ways to the Omaha Jewish and secular community.

Sarah had been involved with many Jewish and secular organizations, such as Hadassah, NCJW, Sisterhood, and Brownie and Girl Scout troops. Sarah started her own company, Restorers, Inc., where she purchased and renovated old buildings. She received a Landmarks' Award for restoration of an Omaha house, served on the boards of the National Association of Home Builders' local and national auxiliaries, and the Omaha Landmarks Association. She was appointed by then Governor Bob Kerrey as a builder member of the Nebraska Investment Finance Authority.

Sarah is survived by daughters Stephanie (Rodger) Howard and Beth (Amnon) Dotan, and grandchildren Liatte Dotan, Yonatan Dotan, Alex Howard and Adam Howard.

Sarah touched the lives of many people with her grace and generosity. The Foundation is grateful for Sarah and Ted's generosity to the Jewish community throughout their lives, and for their after-lifetime planning.



Photo credit: Ariel Panowicz

Sarah Seldin



BALANCE SHEET - JUNE 30, 2023

<u>ASSETS</u>	06/30/22 <u>Beginning</u>		06/30/23 <u>Ending</u>		<u>Change</u>
Chicago Pooled Endowment Portfolio	\$29,943,727	26.50%	\$29,337,049	24.25%	(\$606,678)
Vanguard Life Strat. Moderate Growth Fund	24,733,542	21.90%	27,424,363	22.67%	2,690,821
Vanguard Wellington Admiral Fund	25,289,009	22.39%	27,347,745	22.61%	2,058,736
Vanguard Life Strat. Conservative Growth Fund	25,241,613	22.35%	27,117,548	22.42%	1,875,935
Short-term Investments	2,438,326	2.16%	3,185,385	2.63%	747,059
Common Stocks	2,453,700	2.17%	3,106,860	2.57%	653,160
Alternative Investments	1,600,156	1.42%	1,822,905	1.51%	222,749
Israel Bonds	962,495	0.85%	1,470,206	1.22%	507,711
RBJH Capital Project and JFO Receivable	<u>299,646</u>	<u>0.26%</u>	<u>162,345</u>	<u>0.12%</u>	<u>(137,301)</u>
Managed Assets	\$112,962,214	<u>100.00%</u>	\$120,974,406	<u>100.00%</u>	\$8,012,192
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	3,123,721		3,346,087		222,366
Funds Held and Invested for Benefit of Federation or Its Agencies:					
Jewish Federation Reserve Funds	(3,867,117)		(2,873,364)		993,753
Custodial Funds	<u>(10,384,529)</u>		<u>(10,321,947)</u>		<u>62,582</u>
Total Assets	<u>\$101,834,289</u>		<u>\$111,125,182</u>		<u>\$9,290,893</u>
<u>FUND BALANCES</u>					
Restricted or Designated Endowments	\$64,336,884	63.18%	\$70,903,978	63.81%	\$6,567,093
Donor-Advised Funds	27,911,066	27.41%	30,041,098	27.03%	2,130,032
Unrestricted Endowments	6,297,097	6.18%	6,642,398	5.98%	345,301
Supporting Foundation (Pardes Foundation)	165,521	0.16%	191,622	0.17%	26,101
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	<u>3,123,721</u>	<u>3.07%</u>	<u>3,346,086</u>	<u>3.01%</u>	<u>222,366</u>
Total Fund Balances	<u>\$101,834,289</u>	<u>100.00%</u>	<u>\$111,125,182</u>	<u>100.00%</u>	<u>\$9,290,893</u>



Statement of Support, Revenue, Allocations and Expenses

July 1, 2022 - June 30, 2023

Beginning Fund Balances - 07-01-22	<u>\$101,834,289</u>
Lifetime Gifts and Contributions	7,989,186
Investment Income	8,818,292
Grants and Allocations	(7,111,986)
Beneficiary Income Payments	(123,992)
Foundation Office Expense	<u>(280,607)</u>
Net Change in Fund Balances	<u>\$9,290,893</u>
Ending Fund Balances - 06-30-23	<u>\$111,125,182</u>

Jewish Federation of Omaha Foundation Financial Highlights as of June 30, 2023

A - Summary of fiscal year activity for all funds*

Current value of funds	\$120,974,406
Current number of funds	687
Current number of donor-advised funds	140
Current number of Tzedek Teen funds	119
Current number of endowment funds	428
Number of new funds in 2022-2023 (includes 1 new Tzedek Teen fund)	11

Change in funds from June 30, 2022 to present:

New contributions	\$7,989,186
Investment performance	8,818,292
Grants & Distributions	(7,111,986)
Other	<u>(404,599)</u>
Total	<u>\$9,290,893</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 2023	\$115.6
1 Year Ago	June 2022	108.4
3 Years Ago	June 2020	93.3
5 Years Ago	June 2018	83.6
Total Investment Return - 1 Year		8.32%
Total Investment Return - 3 Years		5.95%
Total Investment Return - 5 Years		5.00%

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



OPPORTUNITY KNOCKS

When you're looking for a way to help those who need it most — and feel good about it — and receive a tax benefit, The Foundation has a variety of funding opportunities to achieve any charitable goal.

PAY IT FORWARD COMMUNITY FUND

This fund is for everyone who would like to show gratitude for the quality of Jewish life we all enjoy. Make a monthly credit or debit card payment starting with a minimum gift of \$18 or make a one-time gift in any amount or pledge an after-lifetime gift. Pay It Forward funds are dedicated to benefiting Omaha Jewish youth.

TZEDEK TEEN FUND

Establish a Tzedek Teen Fund with a one-time contribution of \$125 and The Foundation will add another \$375. Once a year, the teen may donate 10% of his or her fund (\$50) to a Jewish non-profit organization. This fund empowers Jewish teens in 6th-12th grade to make an impact on our community by giving tzedakah and supporting causes important to them. Family and friends can donate to the fund at any time and in any amount. Currently, The Foundation manages 100+ teen funds.

DONOR-ADVISED FUND

These are simple, tax-smart investment opportunities for charitable giving while your money grows tax-free. You can contribute cash, securities or other appreciated assets; you may be eligible for a current year deduction and become more strategic about your giving decisions. You recommend distributions during your lifetime and can leave the remainder to your children, grandchildren or The Foundation as part of your legacy. The Foundation manages over 140 DAFs.

LIFE & LEGACY PROGRAM

In partnership with Harold Grinspoon Foundation and The Foundation, these funds promote after lifetime giving to benefit the Omaha Jewish community and its partner organizations. You select one or more organizations to support and sign a letter of intent with no minimum gift required. Currently, The Foundation administers 680 LIFE & LEGACY commitments.

FOREVER ANNUAL CAMPAIGN GIFT

These are permanent funds established during or after your lifetime and dedicated to endowing your Jewish Federation of Omaha Annual Campaign gift in perpetuity. There are two kinds of Forever Annual Campaign Gifts: The PACE (Perpetual Annual Campaign Endowment) and LOJE (Lion of Judah Endowment). The required amount for both endowments is 25x the amount you intend to give every year, after lifetime. The Foundation invests the funds and the income grows tax-free. Currently, The Foundation manages 40 of these endowments and has 35 signed agreements to be funded in the future.

CHARITABLE GIFT ANNUITY

Through a charitable gift annuity, you can make a gift to the charity of your choice, and receive guaranteed income for yourself and/or a beneficiary of your choice, for life. Annuities can be funded with cash, stock, and mutual funds, as well as non-cash assets like real estate or closely held stock. The payments are fixed for the term of the contract. This is new funding opportunity at The Foundation.



ENDOWMENT FUND

These allow you to give a gift of cash or appreciated assets to establish an endowment at The Foundation, usually in the name of the donor, the donor's family or in memory of a loved one. You can open an endowment fund with a minimum gift of \$10,000. The principal is held in perpetuity while the earnings from the invested assets are distributed per the donor's specifications. You may designate the Federation, a favorite Omaha-area Jewish nonprofit or program to receive annual distributions. Currently, The Foundation manages 400+ endowments.

SUPPORTING FOUNDATION

These are separate legal entities with a separate board created by you and your family. A Supporting Foundation partners with The Foundation to invest the funds, manage the operations and make disbursements as directed by the Supporting Board. Currently, The Foundation manages five Supporting Foundations.



Stacie Metz, Amy Bernstein Shivvers, Diane Walker, Laurie Peatrowsky, and Linda Pollard

We hope you enjoy the 2023 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:

Amy Bernstein Shivvers

Executive Director
(402) 334-6466
ashivvers@jewishomaha.org

Laurie Peatrowsky

Operations Manager
(402) 334-6439
lpeatrowsky@jewishomaha.org

Diane Walker

Fund and Scholarship Administrator
(402) 334-6551
dwalker@jewishomaha.org

Stacie Metz

Program and Stewardship Administrator
(402) 334-6485
smetz@jewishomaha.org

Linda Pollard

Endowment Assistant/Staff Writer
(402) 334-6459
lpollard@jewishomaha.org





BOARD OF DIRECTORS

JULY 1, 2022 - JUNE 30, 2023



Bob Belgrade
President



Stacey Erman Rockman
*Vice President
Newly Elected VP 2023*



Andrew Robinson
Treasurer



Donald Goldstein
Secretary



Michael Abramson



Steven Bloch



Paul Epstein



Ted Friedland



David Gilinsky



Jay Gordman
Newly Elected 2023



Kip Gordman



Howard M. Kooper



Susan T. Lehr
Outgoing 2021-2023



Troy Meyerson
Newly Elected 2023



Murray H. Newman



Steve Nogg



Susan Norton



Carl Riekes



Louri Sullivan
Newly Elected 2023



Jody Malashock
Emeritus



Martin Ricks
Emeritus

Recognition & Appreciation

Jody and Marty, we express our gratitude for serving as the inaugural members of the newly established Emeritus Council. Your active participation at the table brings valuable wisdom, experience, and support to our endeavors.

