

2024 ANNUAL REPORT



The mission of the Jewish Federation of Omaha Foundation is to gather, preserve and increase philanthropic giving to ensure the continuity and enhancement of Jewish life in Omaha.



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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.

## A MESSAGE FROM THE BOARD PRESIDENT & EXECUTIVE DIRECTOR

Dear Friends,

As we reflect on this past year, I am thrilled to share the ways in which we have worked to enhance our service to you—our community. A key focus for us has been user-friendliness, and we are committed to making your every interaction with us as smooth, welcoming, and efficient as possible.

To that end, we are proud to have launched a new website, designed with ease of use in mind. This new platform streamlines access to resources, simplifies donation options, and provides up-to-date information about our programs and events. We have made it easier than ever for you to be inspired, celebrate your impact and connect to our mission.

Beyond technology, our dedicated team is always ready to help, whether you're looking to establish an endowment, explore charitable giving options, create a family foundation, sign-up for Life & Legacy or connect with a local Jewish organization in need. We believe that engaging with us should be straightforward and inviting, and our team is here to make that happen.



Bob Belgrade



Amy Bernstein Shivvers

Our services continue to grow, tailored to meet the needs of this vibrant community. From legacy planning and donor-advised funds to a young professional fund, educational resources and community grants, we aim to provide meaningful and impactful opportunities for all. Each initiative is guided by our commitment to visibility, transparency, accessibility, and building connections across generations.

Be sure to spend a few minutes on our Discover spread (pages 4-5) highlighting an array of the new products, videos and features at The Foundation. Plus, on the adjoining page, is our updated mission statement which was developed during our strategic plan.

Thank you for being part of our journey. Together, we're creating a stronger, more connected community for today and tomorrow.

Warm regards,

Bob Belgrade Board President Amy Bernstein Shivvers
Executive Director

any Bernstein Shivvers

## NEW THINGS TO DISCOVER AT THE FOUNDATION

From innovative giving programs to new approaches in maximizing the impact of our endowment funds, we're continually exploring new ways to empower our community. Whether you're a longtime donor or just beginning your philanthropic journey, there's always something exciting to explore.





#### Young Professional Tzedek Program (YPTP)

Empowers young adults to make a lasting impact through charitable giving. YPTP serves as a bridge program for young adults who previously held a teen charitable fund account, currently maintain one, or are interested in opening an account and are between the ages of 18 and 35. YPTP fund holders will have the opportunity to donate to a non-profit organization that holds personal significance.

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### **3-Year Strategic Planning and Organizational Development**

To ensure the long-term success and sustainability of our organization, we completed a 3-year strategic plan. This process involved engaging with stakeholders, assessing our strengths and weaknesses, creating a team charter and developing a strategic plan and implementation roadmap to guide our future growth and development.

#### **Key 3-Year Strategic Directions:**

- 1. Evolving Our Day-to-Day
- 2. Advancing Our Engagement
- **3**. Nurturing Our Connections

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#### The Foundation's Website -Your Path to Charitable Giving

We are thrilled to announce

the launch of our reimagined website! Please visit **jfofoundation.org** and discover how to open a fund, be inspired by legacies created for our community, learn what The Foundation does and how we can partner! **The QR code takes you to our media page that includes our latest endowment video!** 





#### **Donor Impact Report**

Showcases the incredible impact of your generous contributions alongside stories of philanthropy and updates.



#### Feedback on the new report:

"Kudos, your newly improved, very lovely and easy to read financial report is just FAB..."

"I just received my donor impact report in the mail. Very well done! It's easy to read and filled with great information."

"The new report looks great, thank you!"

#### A NEW APPROACH FOR ENDOWMENT DONORS

Restricted dollars can result in underutilized endowment funds, funds with such a specific purpose they rarely got used. How can we free up these restricted funds and funnel those dollars back into the community?

The Foundation staff embarked on a five-month deep dive to address underutilized funds across The Foundation's portfolio. We sorted all the funds by agency and by program to identify those that had not been used in over three years. And yes, there were funds that were getting dusty, waiting for someone to discover and access them.

#### Here is an overview of the Endowment Audit:

- Context on Restricted Funds: Many endowment funds were too specific, leading to underutilization.
- 2. Collaborative Solutions: Conversations with donor families and partner organizations aimed at removing or adjusting restrictions to ensure funds can benefit the community more broadly.

#### 3. PRIORITY B Initiative:

- Objective: Encourage donors to specify multiple alternative uses for their funds.
- Primary and Alternatives: Every fund will retain its primary purpose (PRIORITY A), but will now also include secondary alternatives (PRIORITY B) to ensure the funds can still be impactful if the primary need diminishes.
- Hakarat HaTov Recognizing the Good: The initiative ties back to the Jewish value of gratitude, highlighting the community's generosity and the desire to maximize the impact of contributions.

By implementing the underutilized fund audit, we successfully repurposed dollars that were no longer needed for their original Priority A purposes. These funds are now supporting vital community needs, such as covering funeral expenses, helping Israeli families settle in Omaha, and aiding JCC campers with special needs. This initiative ensures that every dollar continues to work harder for the betterment of our community.

## FOR LOVE OF SANDRA

#### SANDRA L. FELDMAN MEMORIAL FUND

In 1982, the family of Sandra Feldman (of blessed memory) - her mother Elaine, father Maurice (of blessed memory), brother Nathan, and his wife Marsha - created a memorial to honor Sandra's commitment to learning. The Sandra L. Feldman Memorial Fund was established with \$10,000 "to benefit Jewish residents of Omaha wishing to attend graduate school." Over the years, donations continued, and today, nearly \$85,000 has been awarded to 65 graduate students. The current fund balance is \$90,700.

#### CHARITABLE GIVING BEGINS WITH THE HEART.

- What do you care about? Supporting the Jewish community, honoring a loved one, upholding Jewish values?
- Who would you like to help? Children, teens, seniors, or families in need?

These are the questions that shape philanthropy.

When you decide what's important to you, The Foundation can help make it last forever. We can start by looking back at family traditions, assessing today's needs in the community, and looking forward to new opportunities to do good.

Your endowment can be created through donations of stock, cash, an IRA, a bequest, life insurance, or other assets. Once funded, The Foundation will invest it, ensuring your gift grows and supports the community for years to come.

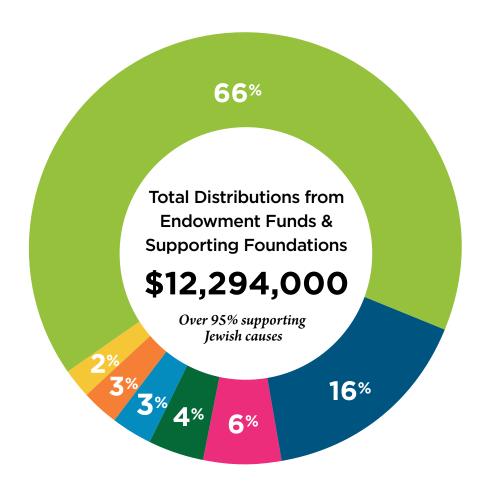
Sandra's story is just one of many where charitable giving begins with the ♥!

#### **ENDOWMENT FUNDS**

#### 2023-2024 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.



66%	Rose Blumkin Jewish Home \$8	8,121,000	3%	Scholarships	383,000
16%	Alan J. Levine Athletic Facility	2,000,000	3%	<b>Local Jewish Organizations</b>	319,000
6%	JFO Annual Campaign & Operating Income	768,000	2%	<b>Outside Organizations</b>	236,000
4%	JFO Agency Programming	467,000			

#### WHY A DONOR-ADVISED FUND?

"I've enjoyed my donor-advised fund and wish we had opened it many years earlier. The structure allows for more thoughtful philanthropy, and donating throughout the year rather than at the year's end. I appreciate the central recordkeeping and ease in sending donations. I can do year-end tax planning and schedule fund contributions separate from charitable giving. A simple email to one of the fund administrators at The Foundation gets the ball rolling and the donation is sent. Very easy and efficient."

**Dr. Eric Phillips** 

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

Jeff Kirshenbaum



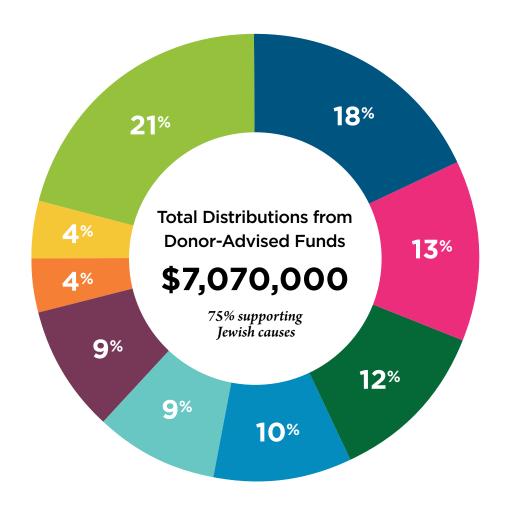
"During my teenage years, I established a Tzedek Teen Account at The Foundation. Recently, I transferred the balance to set up a Donor-Advised Fund there. Now that I'm employed, I can contribute to replenish the fund and recommend grants to various Jewish and secular non-profits across the U.S. The online portal makes it easy to support organizations and causes I believe in. Additionally, I've arranged for an automated monthly donation to support Pay It Forward, a fund created by The Foundation to help Jewish youth participate in programming, education, and camp. It's incredibly rewarding, and even a small amount, starting from \$10, can make a significant difference."

Benjamin Brodkey

#### **DONOR-ADVISED FUNDS**

#### 2023-2024 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.



21%	<b>Local Secular Organizations</b>	\$1,518,000	9%	<b>National Jewish Organizations</b>	671,000
18%	<b>Local Jewish Organizations</b>	1,216,000	9%	Internal Donations to Foundation Funds	664,000
13%	<b>RBJH Building Campaign</b>	882,000	<b>4</b> %	National Secular Organizations	289,000
12%	JFO Annual Campaign	852,000	<b>4</b> %	Local Federation Agencies	265,000
10%	Local Synagogues	713,000			

## IN MEMORY OF SALLY CLAYMAN

Sally Clayman, a proud lifelong resident of

Omaha, passed away in February 2024.

Sally grew up in the Benson area, graduated from Benson High, and later earned a BA in English from UNO. She had two children: Cindy Clayman-Morris, of blessed memory, and Jeff Clayman, who lives in Denver. She was also the beloved grandmother of six and great-grandmother of two.

Sally created three charitable funds through the Jewish Federation of Omaha Foundation in honor of her aunt and uncle, Lillian Keiser Stoms and David Keiser. The Lillian Keiser Stoms Educational Fund provides scholarships for single Jewish custodial parents. The David Keiser & Lillian Keiser Stoms Foundation Education Fund supports university scholarships for Jewish young adults. Finally, the David Keiser & Lillian Keiser Stoms Endowment for Academic Excellence grants college scholarships to Jewish youth based on scholastic achievement and dedication to the Jewish community.

Sally began her career as an advertising copywriter at Bozell & Jacobs, where she launched memorable campaigns, including one for "Storzette," an 8-ounce beer marketed to women. She often recalled meeting Elvis Presley and Johnny Carson during

her early years in Omaha. Despite opportunities to work in broadcast television in New York, Sally chose to stay in Omaha, where she met her husband Albert, married, and started a family.

After their children were born, Sally dedicated herself to their upbringing and later earned an MS in Speech Pathology from UNO. For years, she served as a speech therapist for Education Service Unit #3, supporting children in rural Nebraska with vital speech and hearing services. Her work profoundly impacted her young clients, many of whom would have faced substantial social and educational challenges without her assistance. Later, Sally worked in genetic research coordination at Boys Town, driven by a keen interest in genetics and genetic diseases.

Sally was married to Albert Clayman for 25 years, until his untimely death on their 25th wedding anniversary in May 1983. After Albert's passing, Sally transitioned to a career in property insurance administration until her retirement.

Throughout her life, Sally loved to walk, play tennis, and participate in bridge games with close friends Maxine Simons, Mona Crandell, and Blanche Wise. In her retirement, she devoted extraordinary care to her daughter Cindy, who lived with chronic illness throughout her adult life. Though Sally didn't actively volunteer, she supported numerous community organizations, including Beth El, Beth Israel, the Jewish Federation, and the University of Nebraska Medical Center. Her philanthropic spirit and values were inspired by David Keiser and Lillian Keiser Stoms and became a cornerstone of her life's legacy.

## IN MEMORY OF BETSY DAVIDSON

Betsy Davidson passed away on April 19, 2024. She was preceded in death by her husband of 69 years, Arthur who passed away in August 2019.

Betsy grew up in Minnesota and attended the University of Minnesota, where she met Arthur. They moved to Omaha in 1958 and ran the Omaha branch of Davidson's Furniture. Betsy and Arthur had two children, Mary-Beth and Doug, both of whom reside in Omaha.

Betsy and Arthur loved to travel, play doubles tennis and spend time with family and friends. They traveled to China, Afghanistan, Alaska and Israel and hosted students from various countries.

Betsy was deeply involved in volunteer activities throughout greater Omaha and the Jewish community. Some of her activities included the League of Women Voters, Great Books, Tuesday Musical, the Sisterhood, Temple Israel and NCJW.

The Davidsons established the **Arthur L. and Betsy Davidson Emergency Assistance Endowment Fund** at the Jewish Federation of Omaha Foundation. This fund provides one-time emergency financial assistance to people who work for the Jewish Federation of Omaha, its affiliates, agencies, synagogues, and other Jewish institutions in the Omaha area. Funds can be used to cover immediate living expenses and basic necessities. Betsy and Arthur also established the **Arthur L. and Betsy Davidson Life & Legacy Endowment Fund**.

The Davidsons' generosity and endowments will continue helping those in the Jewish community, Jewish and non-Jewish, for years to come.

#### HONORING IRVING B. AND GERI EPSTEIN:

#### A LEGACY OF SERVICE, FAMILY, AND COMMUNITY

Irving B. Epstein of Omaha passed away on December 25, 2022. He was preceded in

death by his beloved wife of 66 years,
Geri, and his son, Dr. Barry E. Epstein,
for whom Irv and Geri established
the Barry E. Epstein Memorial
Healthcare Fund, a Scholarship Fund
for medical students with the Jewish
Federation of Omaha Foundation.
Irv is survived by his daughters, Leslie
Epstein and Cynthia Epstein; his sonin-law, David Wiesman; and his cherished
grandsons, Harison and Mathew.

A Fellow of the Nebraska Bar Association, Irv had a remarkable legal career spanning over 75 years. He graduated early from Creighton University Law School at the age of 21 and served with distinction in the JAG Corps during the Korean War. Irv began his legal career as an Omaha City Attorney and served on the Omaha Airport Authority, negotiating air space and slips for airlines at Eppley airfield, before transitioning to private practice, where he made significant contributions to the legal community.

In 1994, Irv and his daughter, Cynthia Epstein, founded Epstein and Epstein Attorneys at Law. The firm specializes in corporate, real estate, and estate planning services. They had a combined experience of over 50 years, offering tailored legal solutions to meet their clients' needs.

Geri was an artist. After teaching art for a number of years, Geri opened and ran Geri's Art & Sculpture, a well-known art gallery in Omaha, for over 20 years. She also provided charitable work with Beth Israel Synagogue, Chabad Lubavitch of Nebraska, Inc., and she served as Girl Scout and Cub Scout leaders, as well as, serving as the President of Central High School PTA in the 1970's.

To honor Irv's legacy, Cynthia established and contributed to two endowments, the Irving and Geri Epstein Chabad Life & Legacy Endowment and the Irving and Geri Epstein Beth Israel Endowment. These endowments fulfill Irv and Geri's Life & Legacy commitment, providing annual income to Chabad and Beth Israel Synagogue. Cynthia and Leslie have ensured that their parents' vision and commitment were carried out through their estate plan.

Cynthia reflects on her father's legacy with these words: "My father dedicated his life to serving others through his legal work and community involvement. His commitment to family, justice, and faith was unwavering, and these endowments will ensure that his values continue to benefit the community he loved."

We extend our heartfelt gratitude to Leslie and Cynthia Epstein and family for establishing the Irving B. and Geri Epstein Life & Legacy Endowment Funds. These funds celebrate the lives and love that Irv and Geri shared with our community, ensuring their legacy continues to inspire and support future generations.

## IN MEMORY OF GARY GOLDSTEIN

Gary Goldstein was born in Omaha and died peacefully at his home in Basalt, Colorado with his wife Barbara at his side on April 11, 2024. Gary attended Central High School and went on to graduate from the University of Oklahoma. After graduation, Gary returned to Omaha starting his career as an architect with Leo A. Daly. After a few years he left and worked at other architecture firms before starting his own firm in the 1970s. His firm later merged with Bahr, Vermeer, and Haecker, where he worked until his retirement in 1998.

Gary and Barbara moved to Colorado after his retirement, living in Basalt and Aspen. Gary loved the Rocky Mountains and enjoyed hiking, biking, skiing, camping and being outdoors.

Gary and Barbara established the **Gary and Barbara Goldstein Jewish Youth Camp Fund** to enable Jewish youth under 18 years old to attend summer residential camps, day camps sponsored by the Jewish Community Center of Omaha, Omaha-area synagogues or other summer camping programs sponsored by Jewish organizations. The Goldsteins also established the **Gary and Barbara Goldstein Endowment for the Jewish Federation of Omaha**, and the **Gary and Barbara Goldstein Life & Legacy Endowment Fund**. Both funds provide support to the Nebraska Jewish Historical Society, Jewish Family Service, the Jewish Federation of Omaha, and Temple Israel. And most recently, Barbara established the **Gary L. Goldstein Memorial Perpetual Annual Campaign Endowment Fund** to continue Gary's long-standing commitment to our Annual Campaign in perpetuity.

Gary is survived by his wife Barbara, his son Michael (Dacia) Goldstein, and daughter Beth (Danny) Bernstein. The Jewish Federation of Omaha Foundation is extremely thankful for the generosity of Gary and Barbara Goldstein.

#### STEVEN BLOCH

#### THE FOUNDATION'S VOLUNTEER OF THE YEAR

Steve began serving on The Foundation board in the 1996-1997 fiscal year - that's 28 years

of service and counting! Steve served as President of The Foundation from 2003 to 2009, overseeing the distribution of over \$36 million, primarily within the Omaha Jewish community. Despite a significant market downturn, measurable increases in investment assets were achieved during his tenure. Marty Ricks, Foundation Executive Director during Steve's term, praised him for his dedication and meaningful

seven years as president. According to Marty, "Steve ran highly efficient, effective, and informative board meetings and actively contributed to the design and closing of major gifts."

During his first two years as board President, Steve was instrumental in establishing The Foundation as a separate supporting foundation entity benefitting the Jewish Federation of Omaha, where formally it had been merely a committee of the Federation. This was a prudent change which separated the investment assets of The Foundation from its operating assets, necessary by the realities of our litigious times.

Fortunately, Steve continues to serve on The Foundation board, sharing his vast knowledge and experience. In a tribute from the May 2009 *Jewish Press*, his presidency was described as marking "The end of an era," highlighting his efforts to secure financial resources for the growth of Omaha's Jewish community. Recognized by many in the community, Steve's commitment to The Foundation's growth and asset security was commended by leaders such as Bob Lepp and Murray Newman.

At the conclusion of Steve's presidency, the board established the Steven Bloch President's Fund as an expression of appreciation for his service and a testament to the crucial role he played providing valuable legal counsel and contributing to major gifts. Steve continues to serve on the board, is a member of the Investment Committee and is involved in finalizing the Alan J. Levine estate gift, one of the largest single gifts to The Foundation. His vision, service, participation, and ongoing support are deeply appreciated.

We extend our gratitude to Steve for his continued dedication to The Foundation's mission.

# ENDOWMENT & CUSTODIAL FUNDS

## 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 Taylon 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
- Dana Nogg Kiper and Michael O'Sullivan Fund
- 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





- 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
- PerImeter Family Jewish Family Service
   Assistance Fund
- Ruth and Bernard Raskin Endowment
- Leo and Frances **Rodick** Memorial Endowment
- Craig Saylan Memorial Endowment
- Rosalie and Milton Savlan 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
- 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
- Dana Nogg Kiper and Michael O'Sullivan Fund
- 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
- Natan and Hannah Schwalb Jewish Israel Experience Student Endowment
- 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
- Joe and Tina Meyers 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
- Silvia Roffman LOJE Fund
- 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 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 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
- Herbert Goldsten Donor Advised Fund
- 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
- THE CHESED FUND (formerly Murray H. & 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
- Jacobson Family Endowment for Young Leaders
- 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
- Irving and Geri Epstein Beth Israel Life & Legacy 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
- Irving and Geri Epstein Chabad Life & Legacy Endowment
- 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 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
- Jeanne Lipsey Rosenblum 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
- Joseph and Tina Meyers Life & Legacy Temple Israel Endowment
- Temple Israel Life & Legacy Endowment



#### GIFTS THAT MATURE IN THE FUTURE

#### **Charitable Remainder Trusts:**

Morton A. Ives Murray H. Newman Ruth F. Raskin

#### IN BLESSED MEMORY OF **FOUNDATION DONORS IN 2023-2024**

(July 1, 2023 - June 30, 2024)

#### Sally Clayman

Lillian Keiser Stoms Educational Fund David Keiser and Lillian Keiser Stoms Foundation Education Fund David Keiser and Lillian Keiser Stoms Endowment for Academic Excellence

#### **Betsy Davidson**

Arthur L. and Betsy Davidson Emergency Assistance Endowment for the JFO Arthur L. and Betsy Davidson Life & Legacy Endowment

#### **Gary Goldstein**

Gary and Barbara Goldstein Jewish Youth Camp Fund Gary and Barbara Goldstein Life & Legacy **Endowment Fund** 

Garv and Barbara Goldstein Endowment Fund for the JFO

Life & Legacy

**Betsy Davidson** Norman Denenberg **Gary Goldstein** 



A Forever Annual Campaign Endowment ensures that your annual gift continues to meet the needs of the Jewish community in perpetuity.

This opportunity is not only strategic for our future well-being but also critical. In 1990, the Federation raised \$2.25 million, while last year we raised \$3.2 million. However, to match that past fundraising power adjusted for inflation, we would need to raise **\$5.5 million** today.

Now is the time for us to come together and seize this important opportunity to endow your Annual Campaign gift. Your generous support of the Federation Annual Campaign in past years demonstrates how deeply you care, and it entrusts leadership to allocate funds where they are needed most.

#### LION OF JUDAH ENDOWMENT DONORS

Anonymous Sandra Belgrade\* Carol Bloch Susan Cohn

Aileen Eisenstatt\*

Lisa Epstein
Sandy Epstein
Roz Friedman\*
Pearl Richman Giventer\*
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Kathy Goldstein Shirley Goldstein\* Sharon Kirshenbaum Sharee Newman Nancy Noddle

Patty Nogg Dorothy (Mrs. Henry) Riekes\* Zoë Riekes Kimberly Robinson Silvia Roffman Stacey Rockman Nancy Schlessinger Janice Schneiderman\* Beth Schrager Terri Schrager Cari Sommer\* Joodi Veitzer\*

#### PERPETUAL ANNUAL CAMPAIGN ENDOWMENT DONORS

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Janet & Jerry Slusky
Phil Sokolof\*
Special Donor-Advised
Fund
Maurice\* & Joan Udes
Norman Veitzer

\*Of blessed memory

"Our Jewish community is very important to us, and we are grateful to be able to establish an endowment at The Foundation to ensure our

Annual Campaign gift continues to support the agencies, programs, and individuals who need it most, after our lifetime."

#### **Tina and Joe Meyers**

"We gifted life insurance policies to The Foundation to fund our after-lifetime Annual Campaign gift to the Federation. By transferring ownership of these policies, we received a nice tax deduction and have

the comfort of knowing that a gift in our name will continue to enrich the Jewish community through the Annual Campaign."

#### Fran and Rich Juro

## THE NEXT GENERATION STEPS UP

The mission of The Foundation is to gather, preserve and increase philanthropic giving to ensure the continuity and enhancement of Jewish life in Omaha. Charitable giving begins with the heart, and anyone, regardless of wealth, can leave a legacy.

Every dollar counts for the Jewish causes you care about, and together we can make what's important to you last forever.

While younger Jewish philanthropists may have different priorities than their parents, modeling tzedakah is crucial for passing down these values. Trenton Magid grew up in the Omaha Jewish community and became deeply involved after missions to Israel. He established an endowment fund and contributes to the Jewish campus, saying, "The Foundation makes me proud to be part of the Omaha Jewish community."

Similarly, Jenny and Scott Meyerson embody l'dor v'dor (from generation to generation). Raised in Omaha's Jewish community, they opened a donor-advised fund to support Jewish and secular causes. They also set up a Teen Tzedek account for their sons, teaching them to give back after their Bar Mitzvahs.



Ammy Polanco &

Trenton Magid

Jenny & Scott Meyerson

The Foundation helps ensure Jewish tomorrows by aligning with your priorities and making giving easy. You decide what matters, and we make it last.

#### **OMAHA JEWISH ALUMNI ASSOCIATION**

ANNUAL REPORT 2024

This year, the Omaha Jewish Alumni Association (OJAA) hosted our fourth reunion, following successful gatherings in Scottsdale, Dallas, and Kansas City. We were thrilled to host the Minneapolis Reunion Brunch.

OJAA's mission is to connect Omaha's current Jewish residents with those who have moved away, ensuring the future of Omaha's Jewish community. The vision for OJAA has been inspired by our generous donors, Lisa and Gary Epstein.

On Sunday, July 28, OJAA and the Jewish Federation of Omaha Foundation hosted a brunch in Minnetonka at Jenny Javitch and Alon Ventura's home. It was wonderful to bring together Omahans past and present to reconnect.

Our brunch hosts included Jenny and Jon Benowitz, Rachel and Dan Canfield, Shelby and Ben Epstein, Lisa and Gary Epstein, Sharon and Howard Epstein, Debbie Glotter, Kay Goldstein, Karen Sokolof Javitch and Gary Javitch, and Gail and Steve Machov.

Howard Epstein remarked, "It was good to see so many former Omahans of all ages at the Minneapolis OJAA reunion along with some of their family members who came from Omaha, Dallas, Phoenix and elsewhere. Not only did we meet some people for the first time, but we all had a chance to catch up and revitalize friendships with people we had not seen in many years."

We also launched our new "Where Are They Now?" series, a monthly newsletter and Facebook feature highlighting alumni. OJAA continues to thrive, providing more opportunities for alumni to reconnect.











Photos from the 2024 Minneapolis OJAA Reunion

#### **CELEBRATING A DECADE OF LIFE & LEGACY:**

#### A TESTAMENT TO THE FUTURE OF OUR JEWISH COMMUNITY



Life & Legacy is a powerful way to express your passion, purpose, and commitment to the future of our Jewish community and the organizations you hold dear. Now in its 10th year, the program has received 685 commitments with an estimated value of \$25,666,442. This remarkable milestone demonstrates the dedication of our community to ensuring that Jewish life in Omaha thrives for generations to come.

Our community counts on the participation of each of us to sign a letter of intent and make a promise to give—whether through a cash gift, a percentage of your IRA or estate, a bequest in your will, or a stock donation. All forms of gifts are welcomed, and it's important to remember that a pledged gift today does not impact your current lifestyle; this is a legacy gift, to be fulfilled after your lifetime.

#### **Supporting Our Community's Future**

The substantial gifts received through Life & Legacy benefit a wide range of organizations, including the Jewish Federation of Omaha and its agencies (Institute for Holocaust Education, JCC, JCRC, Jewish Press, JFS/JSO, RBJH, and the NJHS), as well as Beth El, B'nai Israel Living History Museum, Beth Israel, Chabad, Friedel Jewish Academy, Temple Israel and South Street Temple of Lincoln.

By leaving a legacy today, you ensure that the traditions, institutions and values that enrich our lives today will be here for future generations. To learn more about how easy it is to participate, or to join the more than 300 donors who have already pledged their support, please reach out to: **Brad Abramson, Development Manager, at 402-334-6485, or email, babramson@jewishomaha.org** 

Every gift matters, including yours. Together, we can ensure that Omaha's Jewish community continues to thrive for years to come.

To celebrate our 10th Anniversary, the Jewish Community Center came alive with an inspiring evening of music, storytelling, and Jewish culture. Internationally acclaimed performer Ari Axelrod captivated the audience with his show, A Place For Us: A Celebration



Ari Axelrod & Amy Bernstein Shivvers

of Jewish Broadway. The event was a heartfelt tribute to our community's shared heritage, highlighting the impact of after-lifetime giving.

#### Reflections from the Evening:

"Fantastic, unbelievable, magnificent evening!" exclaimed Susie Silverman. "As we celebrate this milestone, we are reminded that by investing in Life & Legacy, we ensure that the organizations and values we cherish will continue to flourish."

"Ari's performance and the evening were one of my favorites!" shared Margo Riekes, capturing the sentiment of many attendees.

Jan Goldstein expressed her gratitude, saying, "Kol HaKavod for last night's event! It was so wonderful. And Life & Legacy—what a success for our community!"



#### ASSURE JEWISH TOMORROWS

#### Life & Legacy Thank You to the members of omaha's IEWISH COMMUNITY WHO HAVE MADE A LIFT JEWISH COMMUNITY WHO HAVE MADE A LIFE & LEGACY™ COMMITMENT.

Rabbi Steven Abraham Michael & Sheri Abramson Michael Albert\* Anonymous (39) Ansari Family

John Atherton & Marti Rosen-Atherton Elvce\* & Arveh Azriel **Bob Belgrade** Sandra Belgrade\* **Harry Berman** Marilyn F. Berman

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Esther Silver Denise C. Silverman

Stanley\* & Norma\* Silverman

Susan 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 **Basva Tsed** 

R. Thomas Vann Irving & Gail Veitzer

Norman & Joodi\* Veitzer John\* & Donna Walter Jim & Esther\* Wax Steve & Jove Wees

Aaron Weiner & Therese Vaughn

Harry M. Weiner Kathy Weiner

Rabbi Yaakov & Ilana Weiss

Beniamin & 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 as of November 25, 2024

**Bolded** - This means individual(s) have indicated to The Foundation they have formalized their commitment legally.

Contact the Jewish Federation of Omaha Foundation today!

**Amy Bernstein Shivvers Executive Director** 402-334-6466

**Brad Abramson** Development Manager 402-334-6485 ashivvers@jewishomaha.org babramson@jewishomaha.org

#### BALANCE SHEET - JUNE 30, 2024

<u>ASSETS</u>	06/30/23		06/30/24		
	<u>Beginning</u>		<b>Ending</b>		<u>Change</u>
Vanguard Life Strat. Moderate Growth Fund	\$27,424,363	22.67%	\$29,931,533	23.74%	\$2,507,170
Vanguard Wellington Admiral Fund	27,347,745	22.61%	29,641,699	23.51%	2,293,954
Chicago Pooled Endowment Portfolio	29,337,049	24.25%	29,183,013	23.15%	(154,037)
Vanguard Life Strat. Conservative Growth Fund	27,117,548	22.42%	28,781,082	22.82%	1,663,534
Common Stocks	3,106,860	2.57%	3,673,334	2.90%	566,474
Alternative Investments	1,822,905	1.51%	1,818,436	1.44%	(4,469)
Israel Bonds	1,470,206	1.22%	1,496,499	1.19%	26,293
Short-term Investments	3,185,385	2.63%	1,458,728	1.16%	(1,726,657)
Other Receivables	<u>162,345</u>	<u>0.12%</u>	119,649	0.09%	<u>(42,696</u> )
Managed Assets	\$120,974,406	100.00%	\$126,103,973	100.00%	\$5,129,566
Charitable Remainder Trusts and Life Insurance					
(Under Separate Management)	3,346,087		1,122,896		(2,223,191)
Investment Held at First Interstate Bank					
(Under Separate Management)	0		2,483,694		2,483,694
Funds Held and Invested for Benefit of Federation or Its Agencies:					
Jewish Federation Reserve Funds	(2,873,364)		(4,065,723)		(1,192,359)
Custodial Funds	(10,321,947)		(10,473,067)		<u>(151,120</u> )
Total Assets	<u>\$111,125,182</u>		<u>\$115,171,773</u>		<u>\$4,046,590</u>
FUND BALANCES					
Restricted or Designated Endowments	\$70,903,978	63.81%	\$68,776,557	59.72%	(\$2,127,421)
Donor-Advised Funds	30,041,098	27.03%	35,728,806	31.02%	5,687,708
Unrestricted Endowments	6,642,398	5.98%	6,847,894	5.95%	205,496
Charitable Remainder Trusts and Life Insurance	0,012,370	3.5070	0,017,001	3.7570	203,170
(Under Separate Management)	3,346,086	3.01%	3,606,590	3.13%	260,503
Supporting Foundation (Pardes Foundation)	<u>191,622</u>	0.17%	<u>211,926</u>	0.18%	<u>20,304</u>
Total Fund Balances	<u>\$111,125,182</u>	100.00%	\$115,171,773	100.00%	<u>\$4,046,590</u>







#### Statement of Support, Revenue, Allocations and Expenses

July 1, 2023 - June 30, 2024

Beginning Fund Balances - 07-01-23	\$111,125,182
Lifetime Gifts and Contributions	10,785,053
Investment Income	12,496,931
Grants and Allocations	(18,577,152
Beneficiary Income Payments	(93,992
Foundation Office Expense	(564,249
Net Change in Fund Balances	\$4,046,591
Ending Fund Balances - 06-30-24	\$115,171,773

#### Jewish Federation of Omaha Foundation Financial Highlights

as of June 30, 2024

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

Change in funds from June 30, 2023 to present:

New contributions	\$10,785,053
Investment performance	12,496,931
Grants & Distributions	(18,577,152)
Other	(658,241)
Total	\$4,046,591

\*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 2024	\$120.6
1 Year Ago	June 2023	115.6
3 Years Ago	June 2021	109.1
5 Years Ago	June 2019	88.0
Total Investment l	Return - 1 Year	11.30%
Total Investment l	Return - 3 Years	2.56%
Total Investment l	Return - 5 Years	6.34%

\*\*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.



#### FUNDING OPPORTUNITIES

#### **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.

#### YOUNG PROFESSIONAL TZEDEK PROGRAM

Empowers young adults to make a lasting impact through charitable giving. YPTP serves as a bridge program for young adults who previously held a teen charitable fund account, currently maintain one, or are interested in opening an account and are between the ages of 18 and 35. YPTP fund holders will have the opportunity to donate to a non-profit organization that holds personal significance.

#### **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 150 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 685 Life & Legacy commitments.

#### 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

#### **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.

# FOUNDATION We hope you enjoy the 2024 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
Ipeatrowsky@jewishomaha.org



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



Brad Abramson
Development Manager
(402) 334-6485
babramson@jewishomaha.org



Jen Goodman Administrator (402) 334-6459 jgoodman@jewishomaha.org

#### **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.

# BOARD OF DIRECTORS

JULY 1, 2023 - JUNE 30, 2024



Bob Belgrade Outgoing 2021-2024 President



Stacey Erman Rockman Newly Elected President 2024



Susan Norton Newly Elected VP 2024



Donald Goldstein Secretary



Michael Abramson



Steven Bloch



Beth S. Dotan Newly Elected 2024



Paul Epstein



Ted Friedland



David Gilinsky



Jay Gordman



Kip Gordman



Howard M. Kooper



Steve Levinger
Newly Elected 2024



Troy Meyerson



Murray H. Newman



Steve Nogg



Carl Riekes



Louri Sullivan



Jody Malashock Emeritus Council



Martin Ricks Emeritus Council



Andrew Robinson
Outgoing 2024

#### **THANK YOU**

The Foundation board and staff would like to extend a sincere thanks to Andrew Robinson for his dedication as a board member serving from 2003-2024 and for his continued wisdom on the Investment Committee.