



Jewish Federation of Omaha

Foundation

EXEMPLARY WOMEN
Endowing the Future

2019 ANNUAL REPORT

TABLE OF CONTENTS

Message from the President.....	3
Message from the Executive Director.....	4
Bea Karp.....	6-7
Endowment and Custodial Funds.....	9-14
Gifts that Mature in the Future.....	14
In Memory of 2018-2019 Donors.....	14
PACE/LOJE.....	15
Financial Overview.....	16-19
Ilse Kahn.....	20-21
Harriet Singer.....	22
Sandra Belgrade.....	23
In Memoriam.....	24-25
Omaha Jewish Alumni Association.....	26
LIFE & LEGACY™ Program.....	27-29
Creating a Legacy.....	30
Foundation Staff.....	31
Board of Directors.....	32

Individuals pictured in this Annual Report are not necessarily recipients of Foundation grants. All photos taken at programs and activities that have received funding from the Foundation.



It's more than a donation.
It's your Legacy.



The mission of the Jewish Federation of Omaha Foundation is to help assure the stability and continuity of Jewish life and to support communal services in the Omaha area by establishing and accumulating enduring assets for permanent funding resources.

A MESSAGE FROM THE PRESIDENT

Dear Community Members:

It has been my honor to serve as President of the Jewish Federation of Omaha Foundation for the past two years. I am amazed by how quickly the time has passed. I have greatly enjoyed working with the Foundation, led by our Executive Director, Howard Epstein. He is hard working, enthusiastic and forward thinking about furthering the mission of the Foundation. I would be remiss if I did not mention the extremely professional staff of Janet Henthorn, Operations Manager, Laurie Peatrowsky, Fund Administrator/Marketing Coordinator, Margo Parsow, LIFE & LEGACY Coordinator/Omaha Jewish Alumni Association Coordinator, and Linda Pollard, Endowment Assistant & Staff Writer. They are all a wealth of knowledge, and made my job easy. It has also been my pleasure to serve alongside our Foundation's Board of Directors. It is a group of passionate and committed lay leaders, all of whom have our community's best interest at heart.


Effective July 1, 2019, David Gilinsky assumed the presidency of our Foundation. I am comforted knowing that the reins are being turned over to David. He is bright and capable, and I am confident David will do a wonderful job in his new role. We are also excited that Bob Belgrade has accepted the position of Vice President. We added three new board members, Kip Gordman, Susie Norton and Stacey Rockman. All three of these individuals have been

active in the community for years, and we are confident they will be great additions to our board.

Over the past fiscal year ending June 30, 2019, our managed assets have grown by a modest \$2,615,759 or 2.8%. Our returns were impacted by softness in the market in November and December of 2018. However, our managed assets of \$97,605,407 are at an all-time high. This is truly remarkable considering we also had disbursements of \$7,265,498 (including Federation and custodial funds not included on pages 18 and 19). All of this would not be possible without the generosity of our caring community.

In closing, thank you all for your continued support of the Foundation. It has been a privilege to serve as President, and I look forward to continuing to sit on the board.

Regards,



Ted Friedland
President



Ted Friedland

A MESSAGE FROM THE EXECUTIVE DIRECTOR



Howard Epstein

In 1972, the Newman family gave a very generous gift of \$1,364,298.56 to the Jewish Federation of Omaha, a gift which prompted Morley Zipursky, of blessed memory, then president of the Federation, to form a foundation committee. In an October 11, 1972 letter to the committee, Morley wrote, "I think this is one of the most exciting things that has happened to our community. It can prove to be a great benefit to both the members of our community and the community as a whole. If we do it properly, we can guarantee the continued good condition of the Omaha Jewish community."

Today, the Jewish Federation of Omaha Foundation is well on its way to fulfilling Morley's vision. The Foundation's assets under management have grown to a record \$97.4 million dollars. Even more significantly, for the benefit of the Jewish community, this year the Foundation distributed \$1,980,000 from 349 different endowment funds, \$2,143,000 from 139 donor-advised funds, and \$285,000 from 5 supporting foundations.

You, our generous donors and supporters, have made this all possible through endowments, donor-advised funds, supporting foundations, and commitments to support the LIFE & LEGACY™ initiative. We could not accomplish this without your support, and we heartily applaud and thank you.

Our Foundation staff works tirelessly and deserves much credit for all that has been accomplished. This dedicated group includes Operations Manager Janet Henthorn, Fund Administrator/Marketing Coordinator Laurie Peatrowsky, LIFE & LEGACY/Omaha Jewish Alumni Association Coordinator Margo Parsow, and Endowment Assistant/Staff Writer Linda Pollard. With almost 45 years collective experience, these four women

get things done and make things happen. I truly thank them for being so helpful, capable and caring.

The Foundation Board of Directors continues to play a vital role in overseeing the growth, development, and direction of the Foundation. This group of 19 men and women dedicate their time, talent and treasure to the work of the Foundation and the betterment of Omaha's Jewish community. Sincere thanks to all of them. This year, Mike Erman and Jeff Schrager completed their terms on the board, and we give them a special note of thanks.

A very special thanks goes to Ted Friedland, who just completed his term as President of the Foundation Board of Directors. Ted has made it his mission to be knowledgeable about all Foundation matters and to be readily available for consultation, advice and insight. It has been a pleasure and honor to work closely with Ted during his tenure as president. He has capably and confidently led the Board of Directors, and we all look forward to his ongoing dedication to the Foundation as he steps into his role as immediate past president.

On July 1, 2019 we welcomed David Gilinsky as the newly-elected President of the board. We look forward to working closely with David. Under his leadership, we are confident that the Foundation will continue to grow and flourish. We also welcome Kip Gordman, Susie Norton, and Stacey Rockman to the Foundation Board. They began their service to the board on July 1, 2019, and we thank them for their willingness to be of service to the Foundation and the community.

With sincere thanks,

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

Howard Epstein
Executive Director





Bea

was born in Lauterbach, Germany in 1932. When she was just 8, Bea and her family were sent to concentration camps in Southern France. Bea and her younger sister were saved by the French Jewish Underground (the OSE), and hidden in nearly 15 different homes and a convent before the war's end. Their parents were murdered in Auschwitz. Bea came to NY in 1947 and later settled with her family in Omaha.



Photo courtesy
of David Radler

Bea Karp

Bea Karp left an enormous impact on the lives of those who were privileged enough to know her or hear her speak. Through her work with the Institute for Holocaust Education and her book, *My Broken Doll*, Bea touched the hearts and lives of thousands of people. She tirelessly gave so much of herself to Omaha and to the Omaha Jewish community – her time, her energy, her personal story.

In her thoughtful and caring way, Bea Karp made after-lifetime plans to continue her support of the Jewish community and those Jewish organizations that she loved. Bea made LIFE & LEGACY after-lifetime commitments to four organizations. Four new endowment funds at the Jewish Federation of Omaha Foundation were created with Bea's bequest: the Beatrice Karp LIFE & LEGACY Endowment for the Institute for Holocaust Education, the Beatrice Karp LIFE & LEGACY Endowment for Jewish Family Service, the Beatrice Karp LIFE & LEGACY Endowment for the Anti-Defamation League, and the Beatrice Karp LIFE & LEGACY Endowment for Beth El Synagogue.

Bea worked tirelessly for the Institute for Holocaust Education. Scott Littky, IHE Executive Director, said, "The IHE is honored to receive a LIFE & LEGACY gift from Bea Karp, of blessed memory. Her dedication and love for the Institute for Holocaust Education ran very deep. We were very fortunate to have had her tell her story to thousands of people over many years. Her hope and dreams to create a better world helped to encourage all who heard her to live a more meaningful life."

"Bea Karp was the embodiment of everything the ADL-CRC stands for. Her compassion and empathy for others was legendary. Bea's courage in speaking out against all hate and bigotry is an inspiration," said Pam Monsky, ADL Community Development Liaison. "We are grateful for her incredibly generous LIFE & LEGACY gift and we will make sure that Bea's memory will live on through our work."

"My mother had a love for the Jewish people and Jewish community of Omaha. She was very generous and wanted to endow Jewish Family Service, whose mission was very important to her," noted Deborah Pappenheimer.

"'Poor me' was not in her vocabulary. Mom was a survivor with great strength to carry on despite all of life's challenges," noted Deborah. With Bea's generous gifts, the organizations that she endowed will be able to meet their challenges much more easily, and continue the work that meant so much to Bea.



Bea Karp with an Omaha Family during the IHE's Middle School Gallery Reception

Women's Philanthropy Division Appreciation Event



The Jewish Federation of Omaha has been partnering with MOMentum since 2016. The Jewish Federation of Omaha Foundation has helped fund these amazing trips to Israel for 48 Omaha Jewish mothers.

MOMentum is a global movement focused on the greatest influencer -- the Jewish mother. Dedicated to inspiring Jewish mothers to live their most meaningful lives, MOMentum offers empowering journeys, revitalizing events, and a robust multimedia platform. MOMentum is where Jewish comes to life.

Funds providing income for the annual budget of the Jewish Federation of Omaha and its Agencies

JEWISH FEDERATION OF OMAHA

- Bette R. and Samuel **Alloy** Endowment
- Jane H. **Brooks** Endowment
- **B'nai Jacob Adas Yeshuron** Synagogue Fund
- **B'nai Jacob Anshe Sholom** Synagogue Fund
- Max and Betty **Falk** Jewish Education Endowment
- **Friedland** Family JCC Campus Maintenance Endowment
- Roz and Ike **Friedman** Endowment
- **Goldstein** Family Jewish Press Endowment
- Arthur and Ruth **Goldstein** Endowment
- **Gotsdiner** Family Endowment
- Morton **Ives** Unrestricted Endowment
- Eve **Katskee** Jewish Press Endowment
- Rabbi Myer S. and Dorothy **Kripke** Jewish Press Support Fund
- Carole and Wayne **Lainof** Endowment
- Stanford **Lipsey** Jewish Press Endowment
- **Livingston** Jewish Community Center Endowment
- Ephraim L. **Marks** Federation Endowment
- Herman and Mary **Meyerson** Endowment Fund
- Phyllis H. and E. Robert **Newman** Endowment
- Morton A. **Richards** Endowment
- Dorothy L. and Max **Riekes** Endowment
- Ted and Dorothy **Blacker Rothkop** Endowment
- Phyllis and Irvin **Sherman** Family Endowment
- Judith A. and Gerald B. **Simons** Endowment
- Maxine and Milton **Simons** Endowment
- **Staenberg** Federation Endowment
- Dr. Charles and Mary Ann **Taylor** LIFE & LEGACY Endowment
- Selma and Isidore M. **Tretiak** Endowment
- Paul **Veret** Endowment Fund
- Anna E. and Benjamin **Wiesman** Endowment
- Anna E. and Benjamin **Wiesman** Endowment for the Jewish Press
- Ann H. and William H. **Wolfson** Endowment
- Center for Jewish Life Campaign Legacy Fund
- Community Relations Committee Campaign Legacy Fund
- Free Loan Fund
- Heritage Allocation Fund
- Jewish Community Center Campaign Legacy Fund
- Jewish Community Center Endowment
- Jewish Education Endowment
- Jewish Federation of Omaha Unrestricted Endowment
- Jewish Press Campaign Legacy Fund
- Jewish Press Centennial Fund

JEWISH SOCIAL SERVICES

JEWISH FAMILY SERVICE

- Beatrice **Karp** LIFE & LEGACY Fund for Jewish Family Service
- Jewish Family Service Campaign Legacy Fund
- Jewish Family Service Endowment

JEWISH SENIOR OUTREACH

- **Chapman/Cherniak/Sher** Fund
- Lillian and Phillip **Crandell** Memorial Fund
- Herbert R. and Ruth L. **Forbes** Memorial Fund
- Celia and Nathan **Grossman** Endowment
- Dr. Isaac and Betty **Sternhill** Endowment
- Community Seniors Endowment
- Jewish Senior Outreach Campaign Legacy Fund

ROSE BLUMKIN JEWISH HOME

- Sylvan **Block** Endowment
- Rose **Blumkin** Jewish Home Endowment
- Loyal B. and Lorene **Cohn** Endowment
- Hazel **Degen** Bequest Fund
- Max and Betty **Falk** Rose Blumkin Jewish Home Endowment
- Isadore H. and Rose K. **Weiner** Trust Fund
- Eli M. and Sara **Zalkin** Endowment



Funds providing income for designated purposes of the Jewish Federation of Omaha and its Agencies

(for Scholarships, Books, Equipment, Israel Trips and a Wide Variety of Programs and Projects)

JEWISH COMMUNITY CENTER

B'NAI B'RITH YOUTH ORGANIZATION

- Dr. Abe **Greenberg**/B'nai B'rith/**Henry Monsky Lodge** Endowment
- B'nai B'rith Youth Organization Program Resource Fund
- Omaha B'nai B'rith Youth Organization Endowment

PENNIE Z. DAVIS CHILD DEVELOPMENT CENTER

- Pennie Z. **Davis** CDC Staff Education Fund
- Eileen S. **Erman** Child Development Center Endowment
- Arthur H. and Ruth M. **Goldstein** Family Endowment
- Robert M. **Nelson** Scholarship Endowment (Future Fund)
- Ernie and Adalynn **Nogg** Memorial Endowment
- Suzanne **Richards Singer** Endowment
- Harold S. **Tuchman** Family Endowment
- Allen and Monie **Zalkin** Memorial Endowment
- JCC Child Development Center Endowment

JCC PROGRAMMING & OTHER PURPOSES

- Al **Clayman** Memorial Endowment
- Arthur H. and Ruth M. **Goldstein** Family Endowment
- Bucky **Greenberg** Aquatic Endowment
- Harvey and Marcia **Lipsman** JCC Youth Endowment
- Trenton B. **Magid** Fund
- Myron (Mike) **Milder II** Memorial Fund
- Bettie and Stuart **Muskin** JCC Youth Sports Fund
- Ernie and Adalynn **Nogg** Memorial Endowment
- Dr. Jay **Parsow** Youth Basketball Scholarship Fund
- Johnny **Rosenblatt** Memorial Student Athlete Endowment
- Jack **Saferstein** Memorial Fund
- Ann **Woskoff Schulman** Memorial Fund
- Allen and Monie **Zalkin** Memorial Endowment
- JCC Building Fund
- JCC Program Scholarship Endowment
- JCC Theatre Program Endowment

JEWISH SOCIAL SERVICES

JEWISH SENIOR OUTREACH

- Merriam and Harold **Cooperman** Senior Services Fund
- Sam and Rosaline **Epstein** Senior Outreach Fund
- **Glazer** Family Endowment
- Shane and David **Kotok** Senior Outreach Fund
- Sol **Kutler** Dental Fund
- **Lippett** Family Endowment
- L.O.V.E. Fund
- Ed and Sally **Malashock** Jewish Senior Outreach Fund
- Bettie and Stuart **Muskin** JSS Endowment
- Al and Vivian **Oruch** Memorial Fund
- Ruth **Riekes Richards** Memorial Fund
- Ervin and Miriam **Simon** Endowment



JEWISH SOCIAL SERVICES

ROSE BLUMKIN JEWISH HOME

- Sheldon A. and Lorrie **Bernstein** Endowment
- Rose **Blumkin** Fund
- David and Helen **Brodkey** Endowment for RBJH
- Jacob and Lillian **Brookstein** Endowment
- Mayer and Tillie **Cohen** Social and Cultural Endowment
- Arthur G. **Epstien** Memorial Fund
- **Erman** Family Torah Repair Fund
- Dr. Abraham D. and Liberty J. **Faier** Memorial Endowment
- Esther **Fox** Memorial Fund
- Carl L. **Frohm** Repair Endowment
- Julius **Froom** and Phil and Minnie **Freeman** Restricted Endowment Fund
- Donald and Andi **Goldstein** Leadership Development Endowment
- Deborah and Arthur M. **Greene** Endowment
- Fred and Ruth **Hahn** Endowment
- Adele **Hornstein** Rose Blumkin Jewish Home Professional Staff Education Fund
- David **Katzman** Endowment
- Shirley and Arthur **Kulakofsky** Endowment
- Betty A. **Studna** and Seymour T. **Lee** Endowment
- Harriett **Lobel** Endowment
- Chester and Phyllis **Lustgarten** Endowment
- Ephraim L. **Marks** RBJH Endowment
- Betty **Marx** Activities Endowment

- **Meyers** Family Legacy of Laughter Endowment
- Leo I. and Helen P. **Meyerson** RBJH Endowment
- Dan **Miller** Endowment
- Dr. Daniel and Harriet **Miller** Memorial Endowment
- **Parsow** Family Endowment
- Janet S. **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
- Irvin and Suzanne **Richards Singer** Endowment
- Marion and Dave **Wine** Endowment
- Janet **Wintroub** Sing-A-Long Fund
- Sara Rose **Woskoff** Arts and Crafts Resource Fund
- Religious Programming Fund

JEWISH FAMILY SERVICE

- Paul **Alperson** Endowment
- Steven **Bloch** President's Fund
- Pennie Z. **Davis** Family Life Education Fund
- Nathan and Rose Lillian **Fine** JFS Tzedakah Fund
- Ike **Friedman** JFS Financial Assistance Fund
- Louis **Friedman** Fund for New Americans
- **Glazer** Family Endowment
- Edith and Paul **Goldstein** Endowment
- Samuel and Delma **Goodman** Youth Fund
- Paul and Joy **Grossman** Family Endowment
- **Harris** Family Endowment
- Jennifer Beth **Kay** Memorial Fund
- Sol **Kutler** Dental Fund
- Richard "Pete" **Lee** Memorial Endowment
- Ruth and Otmar **Liebenstein** JFS Financial Assistance Endowment
- **Lippett** Family Endowment
- Jerome J. and Frances O. **Milder** Endowment
- Nancy **Noddle** JFS Financial Assistance Fund
- **Parsow** and **Simons** Families Special Needs Community Fund
- **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
- Robert **Sturm** JFS Housing Assistance Endowment
- Jake and Mary **Wine** Fund
- Yachad Endowment



JEWISH FEDERATION OF OMAHA

JEWISH FEDERATION KRIPKE LIBRARY

- Dr. Morris and Dale Deborah **Brodkey** Memorial Endowment
- Lt. Irving **Cohen** Memorial Endowment
- Dorothy Diva Fund (Dorothy **Kaplan**)
- Shirley and Leonard **Goldstein** Endowment
- Dorothy K. **Kripke** Children's Book Fund
- Rabbi Myer S. and Dorothy K. **Kripke** Library Endowment
- Elinor A. and Norman **Whitman** Memorial Book Appreciation Fund
- Dora **Wolfson** Memorial Library Endowment

JFO PROGRAMMING & OTHER PURPOSES

- Milton R. and Pauline S. **Abrahams** Endowment
- Sandra **Belgrade** Memorial Professional Development Endowment
- Ruth **Frisch** and Oscar S. **Belzer** Endowment
- Dr. Bernard H. **Bloom** and Dr. Bruce S. **Bloom** Memorial Endowment
- Bruce **Fellman** Memorial Young Leadership Award Endowment
- JFO **Friedland Steiner Boggust** Endowment
- **Glazer** Family Charitable Fund
- Arthur H. and Ruth M. **Goldstein** Family Endowment
- Paul and Edith **Goldstein** Family Endowment
- Robert and Ellen **Gordman** Jewish Teen Leadership Fund
- Philip M. and Ethel **Klutznick** Program for Studies in Jewish Civilization Fund
- Aaron H. and Ruth **Somberg Krantz** Fund
- Sadie and Harry **Kulakofsky** Memorial Fund
- Avy L. and Roberta L. **Miller** Family Film Fund
- Gertrude T. and Albert B. **Newman** Endowment
- Morton A. **Richards** Endowment
- Morton A. **Richards** Youth Endowment
- Samuel and Bess **Rothenberg** Memorial Endowment
- Lois Jeanne **Schrager** Memorial Fund
- Frederick J. **Simon** Memorial Endowment
- Kenneth Ray **Tretiak** Memorial Fund

- Federation LIFE & LEGACY Endowment
- Jewish Genetic Testing Endowment
- Lay Seminar Fund
- Youth Foundation Fund

SCHOLARSHIPS

- Lenore **Simon Aronson** Educational Fund
- David E. **Beber** Scholarship Fund
- Truman and Rosemary **Clare** Scholarship Endowment
- Henry A. **Davis** Custodial Fund
- Leo and Aileen **Eisenstatt** Scholarship Fund
- Barry E. **Epstein** Memorial Healthcare Fund
- **J.W.V. Epstein - Morgan Post #260 - Nathan Marcus** Memorial Scholarship Fund
- Sandra L. **Feldman** Memorial Scholarship Fund
- Nathan and Rose Lillian **Fine** Fund for the Education of Students of the Jewish Faith
- Alan and Annie **Fleishman** Scholarship Fund
- David W. and Minnie **Frank** Memorial Scholarship Fund
- Jacob **Friedman** and Betty **Tarnoff Friedman** College Scholarship Endowment
- Rebecca **Friedman** Scholarship Fund
- Carl L. **Frohm** Educational Custodial Fund
- 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
- **Harris** Family Endowment
- Ellen **Canar Joseph** Memorial Endowment
- Samuel and Ida **Kaiman** Endowment
- Ben E. **Kaslow** Scholarship Fund



- David **Katzman** Endowment
- Maxine and Joe **Kirshenbaum** Scholarship Fund
- Betty **Margel** Scholarship Endowment
- David J. and Sue **Meysers** Jewish Experience Scholarship Endowment
- Albert M. and Jeanette T. **Nepomnick** Educational Fund
- Carolyn **Kully Newman** Memorial Fund
- Esther K. **Newman** Memorial Fund
- Gertrude T. and Albert B. **Newman** Endowment
- David S. **Rice** and Esther **Zorinsky Rice** Endowment
- Joe M. and Ruth E. **Rice** Scholarship Fund
- Dorothy **Lustgarten Riekes** Children's Cultural Arts Endowment
- Burton L. **Robinson** Student Athlete Scholarship Fund
- Jerold I. and Sheila E. **Rosen** Endowment
- Lois Jeanne **Schrager** Memorial Fund
- Phillip and Terri **Schrager** Supporting Foundation
- Nate H. and Beatrice **Sherman** Scholarship Fund
- Ruth **Sokolof** Special Education Scholarship Fund
- Benjamin and Elizabeth "Bess" **Stern** Scholarship Fund
- Lillian **Keiser Stoms** Educational Fund
- David **Keiser** and Lillian **Keiser Stoms** Foundation Education Endowment
- David **Keiser** and Lillian **Keiser Stoms** Foundation Education Endowment for Academic Excellence
- Edward **Zorinsky** Endowment
- Ahava Dan Jewish Community Engagement Fund
- CornerStones Fund
- Passport to Israel Program Fund



ESTABLISHED FUNDS DESIGNATED FOR THE JEWISH FEDERATION ANNUAL CAMPAIGN

- Norman B. and Frances P. **Batt** PACE Fund
- Sandra **Belgrade** LOJE Fund
- Herbert M. **Berkowitz** Memorial PACE Fund
- Dr. Mark **Brodkey** PACE Fund
- Leo and Aileen **Eisenstatt** PACE/LOJE Fund
- Ted and Jamie **Friedland** PACE Fund
- Roz **Friedman** and Susan **Friedman Cohn** LOJE Fund
- Thama Lee **Friedman** PACE Fund
- Ned N. and Pearl R. **Giventer** PACE/LOJE Fund
- **Glazer** Family Charitable Fund
- Ann **Goldstein** LOJE Fund
- Kathy **Goldstein** LOJE Fund
- Marcel and Ilse **Kahn** PACE Fund
- Marilyn T. **Kaplan** Fund
- Forrest Nathan and Lisa **Stewart Krutter** PACE Fund
- Steven and Bonnie **Levinger** PACE Fund
- Dr. Sidney **Mirvish** Memorial PACE Fund
- Bettie and Stuart **Muskin** PACE Fund
- E. Robert and Phyllis H. **Newman** PACE Fund
- Martin **Ricks** PACE Fund
- Henry and Dorothy **Riekes** Endowment
- Janice **Schneiderman** LOJE Fund
- Lorraine **Silverman** Annual Campaign Endowment
- Phil and Ruth **Sokolof** Honor Roll Fund
- Cari **Sommer** Memorial LOJE Fund
- Special Donor-Advised Fund
- Maurice and Joan **Udes** PACE Fund
- Norman and Joodi **Veitzer** Fund



JEWISH FEDERATION OF OMAHA FOUNDATION

- David and Helen **Brodkey** Endowment for the Foundation
- Yale **Richards** Professional Education Endowment
- Pardes Foundation

LIFE & LEGACY FUNDS

*Providing income for the various nine partners
(see pages 21-23 for more information)*

- Sandra **Belgrade** LIFE & LEGACY Endowment
- Arthur and Betsy **Davidson** LIFE & LEGACY Endowment
- Gary and Barbara **Goldstein** LIFE & LEGACY Endowment
- Steve and Thelma **Lustgarten** Endowment
- Jody and Neal **Malashock** Endowment
- Bruce **Meyers** LIFE & LEGACY Endowment
- Robert and Betty **Perelman** Endowment for the Federation
- Vicki **Perlmetter** 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

- Robert **Eisenberg** Endowment
- Beverly **Fellman** Best French & Best Hebrew Award Endowment
- Jean **Finnell Henderson** Memorial Scholarship Fund
- Heartland Holocaust Educational Fund (Frances and Sam **Fried**)
- Ann **Goldstein** Outstanding Young Leader Award Endowment
- Gary **Javitch** Family Endowment
- Robert I. **Kully** Endowment
- Louis S. **Kully** and Debra J. **Kully** Endowment for Mt. Sinai Cemetery in Hasting, NE
- **Livingston** Plaza Custodial Fund
- Yale **Richards** Memorial Endowment
- Vivian and Morton **Schwarz** College Scholarship Fund
- Sigma Alpha Mu University of Nebraska Scholarship Fund

FUNDS MANAGED FOR THE JEWISH FEDERATION OF OMAHA

- 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
- Carol and Edward **Schneider** Legacy Endowment for the Jewish Federation of Omaha

SUPPORT FOR PARTNERS / AFFILIATES / OTHER ORGANIZATIONS

ANTI-DEFAMATION LEAGUE - COMMUNITY RELATIONS COMMITTEE

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

BETH EL SYNAGOGUE

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

BETH ISRAEL SYNAGOGUE

- Jake and Susan **Besser** Israel Experience Endowment
- The Hillel Fund

B'NAI B'RITH/HENRY MONSKY LODGE

- Adam **Jacobs** Memorial Tribute Scholarship Fund
- B'nai B'rith Edward **Zorinsky** Fund

B'NAI ISRAEL SYNAGOGUE (Council Bluffs, IA)

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

CHABAD LUBAVITCH OF NEBRASKA

- Ann **Cohen** Memorial Chabad Education Fund
- **Goldstein** Family Endowment for Chabad Lubavitch of Nebraska
- Forrest Nathan and Lisa **Stewart Krutter** Endowment
- Chabad Second Rabbi's Endowment
- Chabad LIFE & LEGACY Endowment

FRIEDEL JEWISH ACADEMY

- 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
- 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. **Riekas** Museum Maintenance Endowment
- Henry and Dorothy C. **Riekas** Museum Occupancy Endowment
- Rosalie and Milton **Saylan** NJHS Endowment
- Mickey and George **Shafer** Endowment Fund for NJHS
- Marlene W. **Hechtman** and Martin M. **Stenberg** Family NJHS Oral History Project Endowment
- NJHS - 5th Commandment Sustaining Fund
- Nebraska Jewish Historical Society Custodial Fund
- Nebraska Jewish Historical Society LIFE & LEGACY Endowment

TEMPLE ISRAEL

- Temple Israel LIFE & LEGACY Endowment

GIFTS THAT MATURE IN THE FUTURE

Charitable Remainder Trusts:

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

IN MEMORY OF OUR FOUNDATION ENDOWMENT DONORS WHO PASSED AWAY IN 2018-2019 (July 1, 2018 - June 30, 2019)

Sandra Belgrade

Sandra Belgrade LIFE & LEGACY Endowment
Sandra Belgrade LOJE Fund
Sandra Belgrade Memorial Professional Development Endowment

Irvin J. Harris

Harris Family Endowment

Ilse Kahn

Marcel & Ilse Kahn Endowment for the Jewish Federation of Omaha
Marcel & Ilse Kahn PACE Fund

Bea Karp

Beatrice Karp LIFE & LEGACY Fund for the ADL/CRC
Beatrice Karp LIFE & LEGACY Fund for Beth El Synagogue
Beatrice Karp LIFE & LEGACY Fund for the IHE
Beatrice Karp LIFE & LEGACY Fund for JFS

Sally Malashock

Ed & Sally Malashock Jewish Senior Outreach Fund

Stanley Perlmeier

Janet S. & Stanley E. Perlmeier Memorial Courtyard Maintenance Fund
Perlmeier Family Jewish Family Service Assistance Fund

Rosalie Saylan

Craig Saylan Memorial Endowment
Rosalie & Milton Saylan Endowment for JFS
Rosalie & Milton Saylan Endowment
Rosalie & Milton Saylan NJHS Endowment

Harriet Singer

Lazier L. & Harriet B. Singer Memorial Fund for Youth

Sherman Sperling

Charitable Gift Annuity for Blumkin Home Capital Project

Anna Wiesman

Anna E. & Benjamin Wiesman Endowment
Anna E. & Benjamin Wiesman Endowment for the Jewish Press

LIFE & LEGACY

Sandra Belgrade	Beatrice Karp	Harriet Singer
Ron Brodkey	Sally Malashock	Anna Wiesman
Ilse Kahn	Rosalie Saylan	Charlotte Zipursky

LION OF JUDAH ENDOWMENT

A Lion of Judah Endowment (LOJE) Fund is created by establishing a fund of at least \$100,000 in the donor's name, ensuring the perpetuation of a donor's Lion of Judah giving level annual campaign gift. It can help you manage your philanthropy in a way that complements your overall tax planning. For example, if you have unusually high income or substantial long-term capital gains in a particular year, you can contribute to your LOJE Fund, and receive your charitable tax deduction that year. Your estate could receive considerable tax benefits if you choose to establish your LOJE Fund with an after-lifetime gift. A LOJE Fund is a powerful statement of a donor's commitment to tzedakah, providing a legacy for herself, her family and her community.

LOJE Donors:

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



Zoë Riekes and Bobbie Leibowitz

PERPETUAL ANNUAL CAMPAIGN ENDOWMENT

A Perpetual Annual Campaign Endowment (PACE) is a permanent fund dedicated to endowing a Jewish Federation of Omaha Annual Campaign gift. A PACE fund is not intended to take the place of any current annual gift – it is instead a lasting legacy that will continue to make an annual gift to the campaign in perpetuity on your behalf. You may create your PACE fund through a variety of vehicles, some of which provide your estate with considerable tax benefits without the requirement that you contribute during your lifetime. These options allow you to perpetuate your commitment to the Federation Annual Campaign in a way that best achieves your own personal financial and estate planning goals.

PACE Donors:

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

**Of blessed memory*

Balance Sheet - June 30, 2019

<u>ASSETS</u>	06/30/18		06/30/19		<u>Change</u>
	<u>Beginning</u>		<u>Ending</u>		
Chicago Pooled Endowment Portfolio	\$26,538,916	27.94%	\$28,232,362	28.92%	\$1,693,446
Boston Jewish Community Endowment Pool	26,902,295	28.32%	27,732,630	28.41%	830,335
Vanguard Life Strat. Conservative Growth Fund	13,262,870	13.96%	14,329,847	14.68%	1,066,977
Vanguard Life Strat. Moderate Growth Fund	13,217,043	13.91%	14,225,688	14.57%	1,008,645
Common Stocks	3,576,228	3.76%	3,052,864	3.13%	(523,364)
Short-term Investments	3,518,670	3.70%	2,595,593	2.66%	(923,077)
Corporate Bonds	2,882,597	3.03%	2,940,027	3.01%	57,430
Alternative Investments	2,665,872	2.81%	2,688,133	2.75%	22,261
RBJH Capital Project and JFO Receivable	1,432,045	1.51%	805,892	0.83%	(626,153)
Israel Bonds	989,023	1.04%	1,000,000	1.02%	10,977
U.S. Government Securities	<u>4,088</u>	<u>0.00%</u>	<u>2,371</u>	<u>0.00%</u>	<u>(1,717)</u>
Managed Assets	\$94,989,648	<u>100.00%</u>	\$97,605,407	<u>100.00%</u>	\$2,615,759
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	2,499,529		2,715,129		215,600
Funds Held and Invested for Benefit of Federation or Its Agencies:					
Jewish Federation Reserve Funds	(1,909,497)		(3,368,387)		(1,458,890)
Custodial Funds	<u>(10,954,719)</u>		<u>(11,169,359)</u>		<u>(214,640)</u>
Total Assets	<u>\$84,624,961</u>		<u>\$85,782,789</u>		<u>\$1,157,829</u>
<u>FUND BALANCES</u>					
Restricted or Designated Endowments	\$51,010,117	60.28%	\$51,129,763	59.60%	\$119,646
Donor-Advised Funds	25,671,853	30.34%	27,049,910	31.53%	1,378,057
Unrestricted Endowments	5,284,768	6.24%	4,738,790	5.52%	(545,978)
Supporting Foundation (Pardes Foundation)	158,694	0.19%	149,197	0.17%	(9,497)
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	<u>2,499,529</u>	<u>2.95%</u>	<u>2,715,129</u>	<u>3.17%</u>	<u>215,600</u>
Total Fund Balances	<u>\$84,624,961</u>	<u>100.00%</u>	<u>\$85,782,789</u>	<u>100.00%</u>	<u>\$1,157,828</u>



Statement of Support, Revenue, Allocations and Expenses July 1, 2018 - June 30, 2019

Beginning Fund Balances - 07-01-18	<u>\$84,624,961</u>
Lifetime Gifts and Contributions	5,747,484
Investment Income	3,902,663
Grants and Allocations	(7,847,821)
Beneficiary Income Payments	(139,824)
Foundation Office Expense	(504,674)
Net Change in Fund Balances	<u>1,157,828</u>
Ending Fund Balances - 06-30-19	<u><u>\$85,782,789</u></u>

Jewish Federation of Omaha Foundation Financial Highlights as of June 30, 2019

A - Summary of fiscal year activity for all funds*

Current value of funds	\$97,605,407
Current number of funds	615
Current number of donor-advised funds	139
Current number of Young Jewish Giving funds	127
Current number of endowment funds	349
Number of new funds in 2018-2019 (includes 14 new Young Jewish Giving funds)	46

Change in funds from June 30, 2018 to present:

New contributions	\$5,747,484
Investment performance	3,902,663
Grants & Distributions	(7,847,821)
Other	(644,498)
Total	<u><u>\$1,157,828</u></u>

*Comprised of all managed assets including segregated assets, Federation and custodial funds, life insurance policies and charitable remainder trusts.

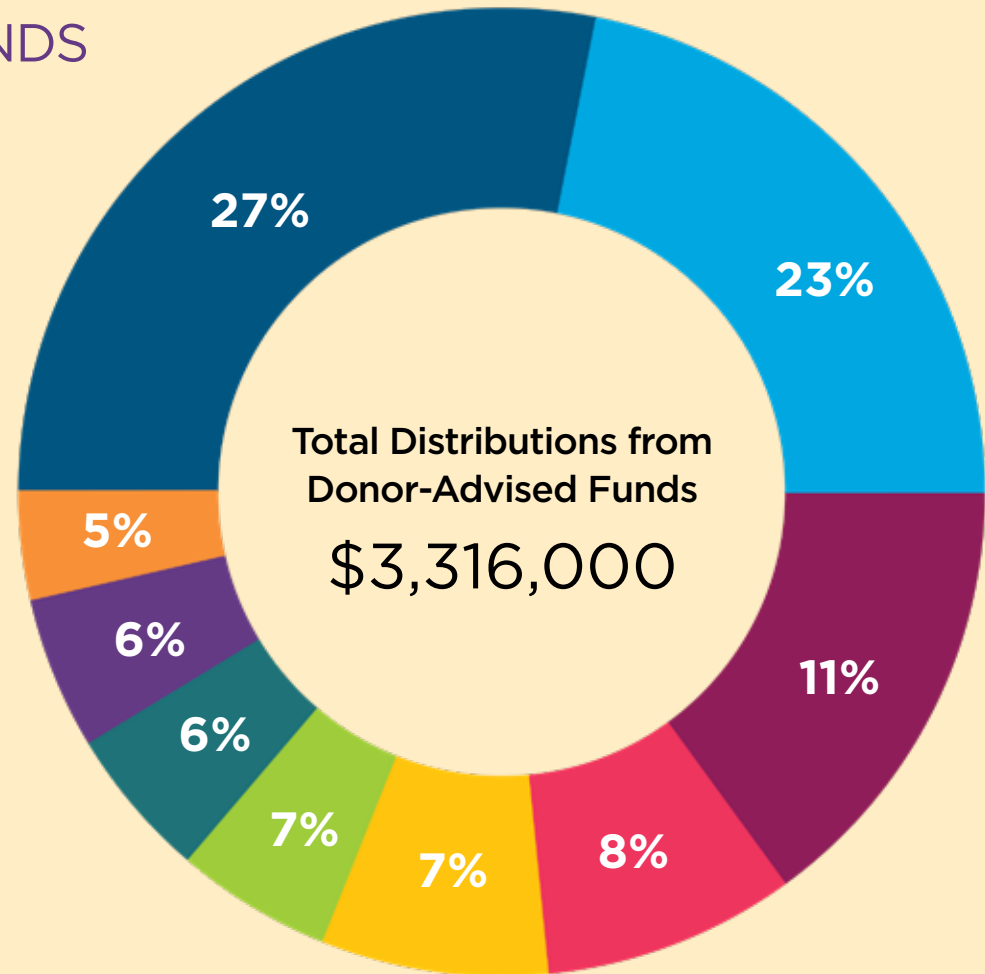
B - History of our invested portfolio at market value**

		(\$ IN MILLIONS)
Current	June 2019	\$88.0
1 Year Ago	June 2018	83.6
3 Years Ago	June 2016	65.7
5 Years Ago	June 2014	69.1
<hr/>		
Total Investment Return - 1 Year		4.45%
Total Investment Return - 3 Years		6.65%
Total Investment Return - 5 Years		3.48%

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

DONOR-ADVISED FUNDS 2018-2019 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.

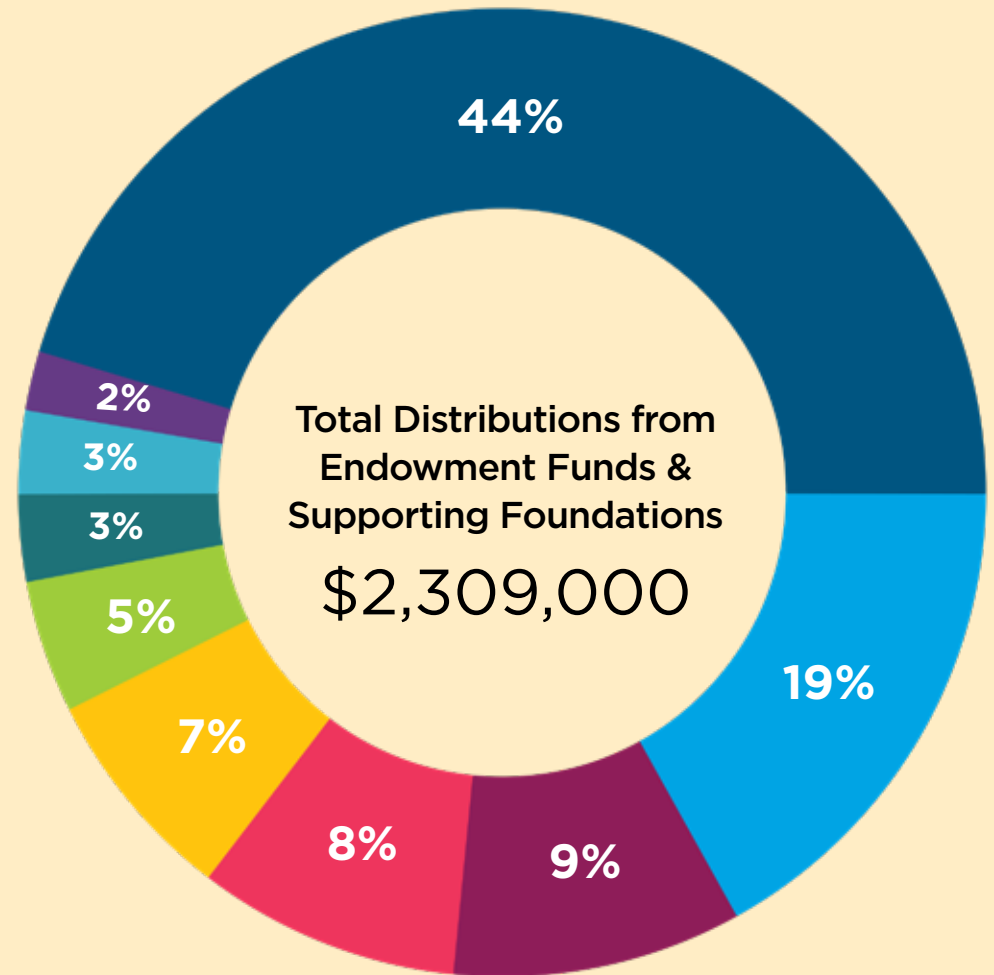


27%	JFO Annual Campaign	\$909,000	7%	Local Federation Agencies	202,000
23%	Local Secular Organizations	775,000	6%	JCC Campus Renovation	196,000
11%	Internal Donations to Foundation Funds	380,000	6%	Local Jewish Organizations	185,000
8%	Local Synagogues	270,000	5%	National Jewish Organizations	180,000
7%	National Secular Organizations	219,000			

ENDOWMENT FUNDS 2018-2019 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.



44%	Jewish Social Services (RBJH/JSO/JFS)	\$1,015,000
19%	JFO Annual Campaign & Operating Income	440,000
9%	Scholarships	215,000
8%	Sokolof Scholarships, Awards & Programs	174,000
7%	JCC Programs & Building Improvements	158,000

5%	JFO Agency Programming	114,000
3%	Foundation Programs	77,000
3%	Local Jewish Organizations	71,000
2%	Outside Organizations	45,000

Ilse Kahn

Ilse Hessel Kahn, of blessed memory, was four years old when she and her parents immigrated to America from Germany. Marcel Kahn was six when he and his parents arrived. With Nazi Germany's expansion throughout Europe, the Hessel and Kahn families were among many Jews who were eager to leave the country. The Hessel and Kahn families were friends and distant relatives. David Kaufman, a Grand Island businessman, who was related to both families, sponsored the Hessels and Kahns for immigration to America. Mr. Kaufman also provided the necessary paperwork for over 100 people to immigrate to the United States. In 1937, the process of applying and being granted visas was started. A year later, the Kahns arrived in the States, coming to Omaha in June 1938. The Hessels settled in Long Island, New York in July of the same year.

The Kahns visited the Hessels after Marcel's college graduation in 1954. Ilse and Marcel had last seen each other in Germany when they were four and six, respectively. The visit gave Ilse and Marcel a chance to get reacquainted, and Marcel was taken with the pretty young woman.

Marcel served in the Air Force for two years after college graduation, and was stationed in Georgia. He had the opportunity to fly on military business between Georgia and New York frequently, and dated Ilse whenever he was in New York. Ilse delightfully surprised Marcel with a "yes" when he proposed marriage, and the Kahns were married in 1956. They lived in Georgia for half a year before settling in Omaha.

Ilse and Marcel Kahn established the Marcel and Ilse Kahn PACE Fund. Ilse and Marcel made LIFE & LEGACY commitments to the Jewish Federation of Omaha and Beth El Synagogue. They also established the Marcel and Ilse Kahn Endowment Fund for the JFO.

Steve Levinger, Chief Development Officer of the Jewish Federation of Omaha, said, "Marcel and Ilse, of blessed memory, have been quiet and yet passionate supporters of the Federation and many of its agencies for decades. Their unassuming approach to philanthropy underscores just how important helping others and tikkun olam has meant to them over the years."

Ilse kept busy as the mother of two sons, a business woman, and she was always deeply involved with activities at Beth El Synagogue. A modest woman, Ilse believed in giving to charities quietly and generously. The Omaha Jewish community has already gained so much from Ilse and Marcel's quiet philanthropy, and will continue to benefit for many generations to come.



Marcel and Ilse Kahn



The Kahns visited the Hessels after Marcel's college graduation in 1954. Ilse and Marcel had last seen each other in Germany when they were four and six, respectively.



Harriet Singer

To honor and perpetuate the memory of her husband of 49 years, **Harriet Singer**, of blessed memory, established the Lazier L. Singer Memorial Fund for Youth in November of 1996. In May 2019, after Harriet's death, her children, Sandy Kutler and Mark Singer, chose to pay tribute to their mother by adding her name to the fund, and it is now known as the Lazier L. and Harriet B. Singer Memorial Fund for Youth.

Harriet was a lifetime member of Hadassah and NCJW, volunteering her time and efforts to help serve the community. Harriet's interests went beyond the Jewish community. She also gave her support for medical research at the University of Nebraska Medical Center through the Department of Pharmacology and Experimental Neuroscience. Harriet was passionate about helping children, and was able to do so through the Lazier L. and Harriet B. Singer Memorial Fund for Youth. This fund provides support for Omaha area Jewish youth under the age of 20 and their families for programs dealing with problems and issues of alcohol, drug use, sexuality, eating disorders, intra-family relations, violence and gangs, suicide and depression, and Jewish identity. Grants are awarded yearly by the Lazier L. and Harriet B. Singer Memorial Fund for Youth Grants Committee. Harriet was very involved with the grant process and served on the committee.



Harriet Singer

Karen Gustafson, Executive Director of Jewish Family Service, stated, "I am and have been very grateful to the Singer Family for providing support for some of the mental health programming, through Jewish Family Service; most recently, helping to fund our "What I Wish You Knew" video that has been shared with over 16 local school districts. Their mission has been to support programming specific to the mental health needs of youth. I recently asked a family member about the history of this mission and how it originated. As we all do in hindsight, I wished that I would have had a deeper conversation with Harriet to learn of her and Lazier's passion in this area. (I was not privileged to have known Lazier before he passed away). Through JFS we will continue to provide meaningful programming to our youth and others, allowing the spirit and gifts of both Lazier and Harriet to live on in our hearts."

Speaking of her mother, Sandy said, "She felt like she had a great life and family and was supported by the Omaha Jewish community and wanted to give back." And with thoughtful planning, Harriet did just that.

Sandra Belgrade

Sandra Belgrade, of blessed memory, was a first generation American who loved her family and her Jewish community. Sandra's son, Bob, remembers how his mother enjoyed hosting the family and preparing holiday meals using old Jewish recipes. She showed her love of our Jewish community by her thoughtful planning in establishing endowment funds to continue her legacy of giving.

Sandra and Ed Belgrade were married for over 42 years, and had three sons, Bob, Bruce and Jim. Ed was involved with the Federation, the Jewish Community Center, and Beth El Synagogue. Sandra's father, Eli Zalkin, was involved with Jewish Philanthropies, Israel Bonds, Beth El Synagogue and was the president of the Dr. Phillip Sher Home for the Aging. Sandra strongly believed in supporting Jewish organizations and Jewish life.

In 2007, Sandra established an endowment for the Nebraska Jewish Historical Society, and in December of 2014, she created the Sandra Belgrade LIFE & LEGACY Endowment Fund. Sandra designated the Nebraska Jewish Historical Society, the Jewish Federation of Omaha (RBJH), and Beth El Synagogue as the recipients of her generosity.



Sandra Belgrade

In order to continue her legacy of giving to the Federation, in December of 2018 Sandra donated funds for the Sandra Belgrade LOJE Fund to ensure the future of Omaha's Jewish community. Lastly in 2019, the Sandra Belgrade Memorial Professional Development Endowment Fund was established to help Federation and Beth El Synagogue professional staff attend conferences, workshops and continuing education classes.

Renee Corcoran, Executive Director of the NJHS, said, "Sandra was very, very generous to the NJHS. Her involvement with the Society goes back many years. Her generosity to the LIFE & LEGACY program was just another example of her commitment to preserving the history of our Jewish community for future generations. I miss our conversations and her dedication to making the NJHS and our entire community a better place."

Due to Sandra's philanthropic planning, the entire Omaha Jewish community will benefit from her generosity. Sandra planned ahead and planned well, giving to the organizations that were close to her heart. Her gifts will impact many lives today and far into the future.

In Memoriam

Exemplary Women

We also mourn the passing of these exemplary women and express our gratitude for their generous gifts which will support the Jewish community for generations to come.

See page 14 for an in memoriam list of donor names and funds.



Sally Malashock



Rosalie Saylan



Anna Wiesman

In Memoriam

Sherman Sperling

Sherman Sperling was born in Sioux City, Iowa, and moved to Council Bluffs after serving in the Army Air Corp in World War II. He and his wife, Harriett, moved to Omaha in 1963. Sherman operated Mid West Auto Supply Company, and after his retirement he started a sign painting company. In 2003, Sherman and Harriett moved to California to be close to their daughter Kathy and her family. The Sperlings were very active at Temple Israel while living in Omaha, and remained active in California at Temple Judea. Harriett Sperling passed away in 2011.

Sherman and Harriett Sperling established a Charitable Gift Annuity in 2005. The annuity paid income to the Sperlings during their lifetimes. Upon their deaths, the balance in the annuity went to the Rose Blumkin Jewish Home Capital Project. Through his mindful preparation, Sherman ensured that he could continue to give back to the Jewish community, even after his death.

In Memoriam

Lt. Colonel Irvin Harris

Omaha native Lt. Colonel Irvin Harris served in the U.S. Air Force for nearly 35 years. Spanning those years, he served in World War II, the Korean War, and the Vietnam War. He was a decorated pilot and earned the Distinguished Flying Cross, four Air Medals and many other military honors. Remembering their father's love of planes, Claudia Sherman and Sindie Katskee affectionately shared, "While other little boys played with rubber guns and push carts they made, my father made model airplanes while dreaming about flying an airplane. That opportunity came when he enlisted in the Army Air Corps when he was 20." Upon his retirement from the military, Lt. Colonel Harris lived in California for 40 years, returning to Omaha in 2017.

In December of 1999, Lt. Colonel Harris established the Harris Family Endowment Fund in memory of his wife, Martha and daughter, Lori Harris Sweet. The fund was created to enhance the lives of those individuals with developmental disabilities, and for college scholarships for students with special needs up to age 30, or who are majoring in special education.

Claudia and Sindie further stated, "Our father can be described as a proud, honorable, courageous man – proud of his service, sometimes under dangerous circumstances, to his country, proud of his Jewish heritage, and a proud family man of three daughters, seven grandchildren, and 11 great grandchildren. After he retired, he continued his legacy of service by volunteering at a hospital." That service to community will continue because of the establishment of the Harris Family Endowment Fund.



Lt. Colonel Irvin Harris

Stanley Perlmeter

After serving in the Army Air Corp in World War II, Stanley Perlmeter married Chicago native, Jan Shipiro, in 1948 and they moved to Omaha. Stan started working at Bozell & Jacobs where he rose to the position of Vice President. After leaving Bozell & Jacobs in 1965, Stan established Perlmeter Investments, Ltd., and remained General Partner there until his death. Stan was President of Temple Israel from 1974 to 1976. Stan and Jan moved to Miami in 1980, where they kept busy with many year-around activities. In 2008, after 60 years of marriage, Jan passed away. Stan married Ronnie Koenigsberg in 2009, and they were able to enjoy nine loving years together.

Stanley's son, Rex, said, "My dad was driven by values ardently held and taught - hard work, family, learning, generosity and fun. Everything he did was done with intensity and commitment." Stanley was committed and generous to the Omaha Jewish community. He established two funds: the Janet S. Perlmeter Memorial Courtyard Maintenance Fund, created in 2010, which provides for regular maintenance, repair, and replacement of furnishings in the Rose Blumkin Jewish Home courtyard. After Stan's death the fund was renamed the Janet S. and Stanley E. Perlmeter Memorial Courtyard Maintenance Fund. The Perlmeter Family Jewish Family Service Assistance Fund was established in 2013 to assist needy Jewish individuals and families, covering necessities of life for those residing in the Omaha metropolitan area.



Janet & Stanley Perlmeter

Omaha Jewish Alumni Association

(OJAA) because Omaha is still HOMAHA after all these years.

The mission of the Omaha Jewish Alumni Association is to establish and secure the future of Omaha's Jewish community by connecting Jewish individuals who are currently living in Omaha with all Jewish individuals who formerly lived in Omaha and now live elsewhere.

The OJAA has 812 members and has hosted for its members three wonderful events this fiscal year: Rosh Hashanah Tailgate party, Purim celebration luncheon and a reunion event in Scottsdale, Arizona which over 90 guests attended.

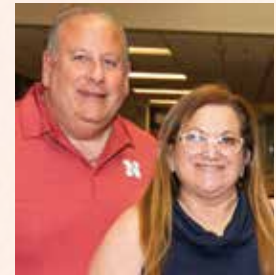
None of this would have been possible without the passion, vision and generosity of Gary and Lisa Epstein who have long been inspired by the strength of our Omaha Jewish community and dreamed about creating a place for current and former Omahans to reconnect. While the Epsteins anticipated that the bulk of membership would continue to come from people who went to high school in Omaha, they want to be clear that the OJAA is open to anyone who is interested in belonging.

The OJAA will continue to reach out through articles, updates, events and social media. The OJAA is here to help you connect so please reach out to us by posting what you love or loved about Omaha or the Omaha Jewish community. You will continue to inspire our vision and purpose as we remember that it is still HOMAHA.

www.facebook.com/OmahaJewishALumni



The Omaha Jewish Alumni Association (OJAA) was created 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.



We believe that people who grew up in Omaha have great memories of Omaha and we always want them to remember their former home and community.

Lisa and Gary Epstein
OJAA Founders



LIFE & LEGACY Program *Coordinator Report 2019*

It has been an exciting year 5 for the LIFE & LEGACY™ program in our community. Over the past 5 years, the Omaha Jewish community has received 652 signed commitment letters with an estimated dollar amount of \$2,165,380. This accomplishment would not have been possible without our nine partner organizations, their lay leaders and volunteers. The agencies include the ADL/CRC, Institute for Holocaust Education, Nebraska Jewish Historical Society, Chabad House, Friedel Jewish Academy, Temple Israel, Beth El Synagogue, Beth Israel Synagogue and the Jewish Federation of Omaha. Additionally, we wish to recognize the vision, leadership and support of our JFOF Board and our generous donors.

It is a privilege to be a part of this partnership with the Harold Grinspoon Foundation LIFE & LEGACY initiative as we continue to cultivate a culture of legacy giving, foster camaraderie among Jewish organizations and secure the future of our amazing Omaha Jewish community.

Very sincerely yours,



Margo Parsow

Margo Parsow
LIFE & LEGACY Coordinator



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:

Jewish Community Center

Jewish Press

Jewish Social Services

(Jewish Family Service, Jewish Senior Outreach, Rose Blumkin Jewish Home)



Thank you to the members of Omaha's Jewish community
who have made a LIFE & LEGACY™ commitment.

Welcome to Jewish Omaha's Legacy Society!

Rabbi Steven & Shira Abraham
Michael & Sheri Abramson
Michael Albert*
Anonymous (41)
Ansari Family
Joyce Ashley
John Atherton & Marti Rosen-Atherton
Elyce & Aryeh Azriel
Bob Belgrade
Sandra Belgrade*
Mark & Jill Belmont
Harry Berman
Marilyn F. Berman
Jake & Susan Besser
Bonnie Rae Bloch
Steven R. Bloch
Becki Brenner
Beth Brodkey
Ron Brodkey*
Miriam Brooks
Carrie & Josh Brown
Elliot Brown
Michelle Byrnes
Beth Cohen
David & Karla Cohen
Marla & Bob Cohen
Drs. Michael & Karen Cohen & Family
Daniel Cohn
Pam Cohn
Justin Cooper
Ronald & Cheryl Cooper
Jerry* & Janey Dann
Hal & Mary Daub
Arthur L. Davidson*
Betsy G. Davidson
Larry & Hanna DeBruin
Rabbi Ari Dembitzer
Deborah Denenberg
Norman & Eunice* Denenberg
Steven Denenberg
Tippi Denenberg

John Carl 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
Richard Evnen
James & Judy Farber
Yonatan & Liz Feldstern
Richard M. Fellman
Toby Fellman*
Cantor Leo & Annette Fettman
Glen H. & Hollie Fineman
Alan J. Fredricks
Arlene Fredricks
Jerry Freeman
Joanne Freeman*
Robyn & Bob Freeman
Julie & Jim Fried
Ted & Jamie Friedland
Bruce & Pam Friedlander
Amy & Sanford Friedman
Lloyd D. & Lois N. Friedman Trust
Lois N. Friedman*
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
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)
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
Gary* & Sally Kaplan
Myron Kaplan
Russ Kaplan
Beatrice Karp*
Gloria C. Kaslow
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Names as of December 20, 2019
*Of Blessed Memory



Sara & Ari Kohen

This is the year to establish your Legacy.
**Contact the Jewish Federation of Omaha
Foundation today!**

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Margo Parsow
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**LIFE &
LEGACY**
Assuring JEWISH TOMORROWS
A program of the HAROLD GRINSPOON FOUNDATION

Creating a Legacy

These charitable planning tools can help you manage your philanthropy in a way that complements your overall tax planning, as you choose to make your contribution either during your lifetime or through your estate.

Donor-Advised Fund

Simply put, a Donor-Advised Fund is a personal charitable tool that helps you organize your charitable giving in one account. You establish a fund with the Foundation by completing a simple agreement and contributing a minimum of \$2,500. You contribute cash or publicly traded securities to your fund at any time. You receive an income tax deduction in the year of the gift, though distributions from the fund need not occur in the same year. The Foundation invests your Donor-Advised Fund assets; income is reinvested and grows tax-free. You recommend distributions of a minimum of \$100 from your Donor-Advised Fund to any IRS qualified 501(c)(3) charity, either Jewish or secular, and the Foundation takes care of the details.

PACE/LOJE Funds

Perpetual Annual Campaign Endowment (PACE) and Lion of Judah Endowment (LOJE) Funds are separate endowments you create at the Foundation, the income from which will make an annual campaign gift in your name well after your lifetime. The funds are intended to provide a gift in your name to the Federation Annual Campaign in perpetuity. The endowment may be funded either during your lifetime or as part of your estate, with potential significant tax benefits in either case. PACE and LOJE are opportunities to make an impact on the Federation and our Jewish community for many years to come.

Supporting Foundation

A Supporting Foundation is a separate legal entity (with a separate board) created by you and your family. This entity enters into a relationship with the Foundation whereby the Foundation manages and invests the funds, administers operations and makes disbursements as directed from time to time by the Supporting Foundation Board.

Endowment Fund

Establishing an Endowment Fund at the Foundation allows you to create a permanent legacy and support the causes within the Jewish community that mean the most to you. An Endowment Fund is created by contributing a minimum of \$10,000. You complete a simple agreement, and then fund your endowment by contributing cash, appreciated securities, a life insurance policy with the Foundation as the beneficiary, by transferring assets from a qualified retirement plan naming the Foundation as a beneficiary or through other means. The Foundation invests your Endowment Fund assets; income is reinvested and grows tax-free. Endowment Funds may be unrestricted or restricted. The Endowment Fund will begin annually providing income for the Jewish purpose you select one year after the fund has been established and every year thereafter in perpetuity.

- Unrestricted Endowment Fund – Annual income is disbursed directly to the Federation for its unrestricted general use.
- Restricted Endowment Fund – Annual income is designated for the purpose you choose. It may support any agency or program on campus.

Charitable Remainder Trust

You create a separate trust which generally provides lifetime income to you and/or your spouse. A determined percentage of the funds contributed to the trust is tax deductible. A corporate trustee holds, invests and distributes the funds during your lifetime. After your passing, the remainder is distributed for the benefit of the Federation and/or its agencies according to your wishes. You determine the purpose.



Janet Henthorn, Margo Parsow, Howard N. Epstein, Laurie Peatrowsky, and Linda Pollard

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

- **Website** - Visit our website (www.jfofoundation.org) to learn more about the Foundation, our community, and establishing charitable funds that support Omaha's Jewish community. Get valuable tips for your financial advisors and yourself.
- **Facebook** - "Like" us on Facebook (JFOF1) to see photos of events supported by our funds and much more.
- **Twitter** - Follow us on Twitter ([jfofoundation](https://twitter.com/jfofoundation)) to quickly get the latest Foundation news and updates.
- **eNewsletter** - Get the latest news about our funds, donors, programs and philanthropic activities, and charitable giving news from Washington and the IRS. Contact us to subscribe to this free monthly service.
- **Phone and Email** - You are always welcome to call, send an email message or stop by our office!

We hope you enjoy the 2019 Annual Report of the Jewish Federation of Omaha Foundation.

If you would like additional information on how you can join the Foundation family and create a legacy for our community, please contact:

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Thank You

The Foundation board and staff would like to extend sincere thanks to Mike Erman and Jeff Schrager for their dedication as members of the Foundation Board. Mike served from 1988-2019 and presided from 1998-2000. Jeff Schrager served on the board from 2014-2019.



Jeffrey Schrager
Outgoing 2019