



AS MY ANCESTORS PLANTED
FOR ME BEFORE I WAS BORN,
so do I plant for those who will come after me.

-Talmud



2018 ANNUAL REPORT



TABLE OF CONTENTS

Message from the President & Executive Director.....	3
Caryl & Barton Greenberg Bequest.....	4-5
Endowment and Custodial Funds.....	7-12
Gifts that Mature in the Future.....	12
In Memory of 2017-2018 Donors.....	12
PACE/LOJE.....	13
Financial Overview.....	14-17
Dr. Edward & Sally Malashock Gift.....	18-19
The Goldstein Legacy.....	20
LIFE & LEGACY™ Program.....	21-23
Omaha Jewish Alumni Association.....	24-25
Creating a Legacy.....	26
Foundation Staff.....	27
Board of Directors.....	28



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.

Cover Photo - Ezra Goldsweig,
son of Andrew and Bracha Goldsweig

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.

A MESSAGE FROM THE PRESIDENT & EXECUTIVE DIRECTOR

Thank you for your generosity, support, and dedication to the future of Omaha's Jewish community. It is our honor to present this 2018 Annual Report to you, and to reflect upon the Foundation's progress and accomplishments during the past year.

For the fiscal year ended June 30, 2018, the assets under management at the Jewish Federation of Omaha Foundation reached a record \$95 million. Twenty people established new endowment funds and 23 Foundation supporters stepped forward to start new donor-advised funds. The LIFE & LEGACY initiative continues its strong path to success, with 325 generous Omahans promising 633 gifts now or after their lifetimes to secure the financial future of Jewish Omaha. The estimated value of those LIFE & LEGACY gifts as of June 30, 2018 was \$17.7 million.

Sadly, some of the Foundation's long-time donors and supporters passed away this year. Yet even after their lifetimes, they continued to generously support the Omaha Jewish community they loved. Through wills, trusts, life insurance, retirement plans and charitable remainder trusts, these donors gifted over \$6 million to help solidify the financial future of Omaha's Jewish community.

The Foundation mission, the core of our existence, is to assure the stability and continuity of Jewish life and to support communal services in the Omaha area. Thanks to our generous donors, we did just that in 2018. Through endowments, donor-advised funds and supporting foundations, the Foundation disbursed over \$7 million during the past year including:

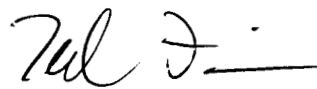
- \$3.6 million for the funding needs of the Jewish Federation of Omaha and its agencies, including \$678,000 to help Omaha's Jewish needy and elderly through Jewish Family Service, Jewish Senior Outreach and the Rose Blumkin Jewish Home.
- \$277,000 in scholarships to help families and students with their college educations, to attend Jewish summer camps, and to enroll in the Pennie Z. Davis Child Development Center and the Friedel Jewish Academy.

- \$576,000 to Omaha area synagogues and other Jewish organizations.
- \$309,000 in funding for capital and building and security improvements and upgrades at the Federation campus, including the JCC.
- \$719,000 to support national Jewish and secular organizations in their charitable endeavors.

The Foundation could not accomplish all it does without the dedication of our Foundation staff. Many of you have had the pleasure of interacting with Operations Manager Janet Henthorn, Fund Administrator/Marketing Coordinator Laurie Peatrowsky, LIFE & LEGACY Coordinator Margo Parsow, and Endowment Assistant/Staff Writer Linda Pollard. Individually and collectively, they make things happen and we thank them for being so capable, competent, caring, and helpful.

Thanks also to the Foundation Board of Directors. This group of 18 community leaders has the best interests of Omaha's Jewish community at heart. Together, they oversee the growth, direction and development of the Foundation, providing the wisdom and guidance that is so important to the success of the Foundation.

With sincere thanks,



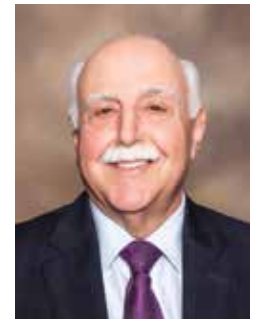
Ted Friedland
President



Howard Epstein
Executive Director



Ted Friedland



Howard Epstein



No Place for Hate® is an initiative providing schools and communities with a climate improvement framework for combating bias, bullying and hatred - leading to long-term solutions for creating and maintaining a positive learning environment.

No Place for Hate® is helping students, educators, and family members across the country improve school climate so that all students can thrive socially and academically as engaged global citizens.

Greenberg Bequest

Makes the World a Better Place – No Place for Hate®

Caryl and Barton (Bucky) Greenberg shared a strong commitment to Omaha, and to the youth in the community. During their lifetimes they both served the youth of the community, and the Omaha area through their volunteer activities. With a desire to continue helping to serve the young, Caryl and Bucky left a bequest in their will for the Anti-Defamation League through the Jewish Federation of Omaha Foundation. Mary-Beth Muskin, Regional Director of the ADL, stated, “Bucky was an amazing gentleman who was remarkably committed to the ADL-CRC, the community and making the world a better place. The scholarship is a way to honor his and Caryl’s memory and continue their work.”

The Barton (Bucky) and Caryl Greenberg ADL-CRC Memorial No Place for Hate Scholarship Fund will provide college scholarships to graduating high school seniors who have actively engaged in the ADL’s No Place for Hate program at their schools, or other ADL sponsored anti-bias or bullying prevention program for high school students. The scholarships are open to all high school seniors who attend a No Place for Hate school, have made a commitment to making their school environment better, and will continue their education, using their No Place for Hate skills in their community into the future.

Reflecting on his parents lives, Joe Greenberg stated, “Overall, I would say they lived charmed lives. They were happily married for over 60 years, they were healthy until the end, and they were able to do the things in life that they wanted to do. They were role models for how to live a good, full life.” Daughter Beth Greenberg added, “Love of family, friends, community and Judaism permeated both Bucky’s and Caryl’s lives, and they shared the most profound love for each other. Perhaps both of their mottos would be, ‘Live life with purpose and enjoy life while you can.’ They often said that money was only good for the good you could do with it.” The ADL and the Jewish Federation of Omaha Foundation are grateful for Caryl and Bucky’s charitable planning for the future of the ADL.



*...so do / plant for those who
will come after me.*

Yom HaShoah Institute for Holocaust Education exhibit at Beth El Synagogue



Holocaust survivors and IHE staff at a farewell
get together for Liz Feldstern

The objectives of the annual Holocaust Commemorations are two-fold:

- To remember the 6 million Jews and millions of others who were murdered in Nazi Europe, and all that was lost with them
- To honor the living - those who miraculously survived the Holocaust, their children and grandchildren

The most fitting way to mark Yom HaShoah (Holocaust Commemoration Day) is as a community. This expresses our shared loss - a loss to all of humanity.



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 **Lipsev** 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
- 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 SOCIAL SERVICES

JEWISH FAMILY SERVICE

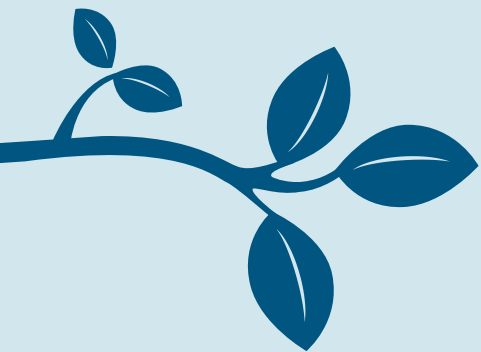
- Jewish Family Service Campaign Legacy Fund
- Jewish Family Service Endowment

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
- CDC Right Start Subsidy Fund
- JCC Child Development Center Endowment

JCC PROGRAMMING & OTHER PURPOSES

- Al **Clayman** Memorial Endowment
- Arthur H. and Ruth M. **Goldstein** Family Endowment
- Harvey and Marcia **Lipsman** JCC Youth Endowment
- 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
- 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
- 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
- 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
- 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 **Meyers** 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
- CornerStones Fund
- Passport to Israel Program Fund



ESTABLISHED FUNDS DESIGNATED FOR THE JEWISH FEDERATION ANNUAL CAMPAIGN

- Norman B. and Frances P. **Batt** PACE 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
- Vicki **Perlmeter** LIFE & LEGACY Endowment
- Denise **Silverman** LIFE & LEGACY Endowment
- Stanley and Norma **Silverman** LIFE & LEGACY Endowment

SUPPORTING FOUNDATIONS 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. **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
- Jule M. **Newman** Memorial Anti-Bigotry Endowment
- ADL LIFE & LEGACY Endowment

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 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
- Friedel Future Fund

INSTITUTE FOR HOLOCAUST EDUCATION

- Institute for Holocaust Education LIFE & LEGACY Endowment

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
- 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:

Arthur Grossman
Morton A. Ives
Charles A. and Lyra Ann Monasee
Murray H. Newman
Ruth E. Raskin
Jeanne Lipsey Rosenblum



IN MEMORY OF OUR FOUNDATION ENDOWMENT DONORS WHO PASSED AWAY IN 2017-2018

(July 1, 2017 – June 30, 2018)

Barton Greenberg

Barton (Bucky) and Caryl Greenberg ADL-CRC Memorial No Place for Hate Scholarship Fund

Gerald Gross

Gerald and Pearl Osoff Gross Endowment

Irvin J. Harris

Harris Family Endowment

Sol Kutler

Sol Kutler Dental Fund

Phyllis Lustgarten

Chester and Phyllis Lustgarten Endowment

Adrienne Milder

Joe M. and Ruth E. Rice Scholarship Fund

Rosalie Saylan

Rosalie and Milton Saylan Endowment for JFS
Rosalie and Milton Saylan Endowment
Rosalie and Milton Saylan NJHS Endowment

Milton Simons

Maxine and Milton Simons Endowment
Parsow and Simons Families Special Needs Community Fund

LIFE & LEGACY

Eunice Denenberg

Barton Greenberg

Rosalie Saylan

Morley 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:

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



Janice Schneiderman, Patty Nogg, Zoe Riekes, Nancy Noddle, Maxine Kirshenbaum, Stacey Rockman

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

Annual Campaign Endowment (Term of Years) Donor:

Phil Sokolof*



**Of blessed memory*

Balance Sheet - June 30, 2018

<u>ASSETS</u>	07/1/17		06/30/18		Change
	<u>Beginning</u>		<u>Ending</u>		
Chicago Pooled Endowment Portfolio	\$23,568,940	29.11%	\$26,538,916	27.95%	\$2,969,976
Boston Jewish Community Endowment Pool	22,470,873	27.76%	26,902,295	28.32%	4,431,422
Vanguard Life Strat. Conservative Growth Fund	23,025,582	28.44%	13,626,870	13.96%	(9,762,712)
Vanguard Life Strat. Moderate Growth Fund	0	00.00%	13,217,043	13.92%	13,217,043
Common Stocks	1,528,200	1.89%	3,576,228	3.76%	2,048,028
Short-term Investments	2,062,706	2.55%	3,518,670	3.70%	1,455,964
Corporate Bonds	4,424,407	5.47%	2,882,597	3.03%	(1,541,810)
Alternative Investments	2,030,721	2.51%	2,665,872	2.81%	635,151
RBJH Capital Project and JFO Receivable	1,776,774	2.19%	1,432,045	1.51%	(344,729)
Israel Bonds	0	0.00%	989,023	1.04%	989,023
U.S. Government Securities	<u>64,983</u>	<u>0.08%</u>	<u>4,088</u>	<u>0.00%</u>	<u>(60,895)</u>
Managed Assets	\$80,953,186	<u>100.00%</u>	\$94,989,648	<u>100.00%</u>	\$14,036,462
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	2,351,884		2,499,529		147,645
Funds Held and Invested for Benefit of Federation or Its Agencies:					
Jewish Federation Reserve Funds	(1,802,285)		(1,909,497)		(107,212)
Custodial Funds	<u>(7,106,468)</u>		<u>(10,954,719)</u>		<u>(3,848,251)</u>
Total Assets	<u>\$74,396,317</u>		<u>\$84,624,961</u>		<u>\$10,228,644</u>
<u>FUND BALANCES</u>					
Restricted or Designated Endowments	\$44,869,471	60.31%	\$51,010,117	60.28%	\$6,140,646
Donor-Advised Funds	21,448,390	28.83%	25,671,853	30.34%	4,223,463
Unrestricted Endowments	5,589,141	7.51%	5,284,768	6.24%	(304,373)
Supporting Foundations	137,431	0.18%	158,694	0.19%	21,263
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	<u>2,351,884</u>	<u>3.16%</u>	<u>2,499,529</u>	<u>2.95%</u>	<u>147,645</u>
Total Fund Balances	<u>\$74,396,317</u>	<u>100.00%</u>	<u>\$84,624,961</u>	<u>100.00%</u>	<u>\$10,228,644</u>



Statement of Support, Revenue, Allocations and Expenses

July 1, 2017 - June 30, 2018

Beginning Fund Balances - 07-01-17	<u>\$74,396,317</u>
Lifetime Gifts and Contributions	12,780,196
Investment Income	4,348,235
Grants and Allocations	(6,145,350)
Beneficiary Income Payments	(144,277)
Administrative Fees	(590,366)
Investment Fees	<u>(19,794)</u>
Net Change in Fund Balances	<u>10,228,644</u>
Ending Fund Balances - 06-30-18	<u>\$84,624,961</u>

Jewish Federation of Omaha Foundation Financial Highlights as of June 30, 2018

A - Summary of fiscal year activity for all funds*

Current value of funds	\$94,989,648
Current number of funds	569
Current number of donor-advised funds	128
Current number of Young Jewish Giving funds	113
Current number of endowment funds	328
Number of new funds in 2017-2018 (includes 12 new Young Jewish Giving funds)	55

Change in funds from June 30, 2017 to present:

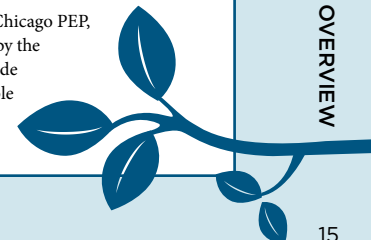
New contributions	\$12,780,196
Investment performance	4,348,235
Grants & Distributions	(6,145,350)
Other	<u>(754,437)</u>
Total	<u>\$10,228,644</u>

*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 2018	\$83.6
1 Year Ago	June 2017	72.2
3 Years Ago	June 2015	70.2
5 Years Ago	June 2013	58.7
<hr/>		
Total Investment Return - 1 Year		6.15%
Total Investment Return - 3 Years		4.10%
Total Investment Return - 5 Years		5.54%

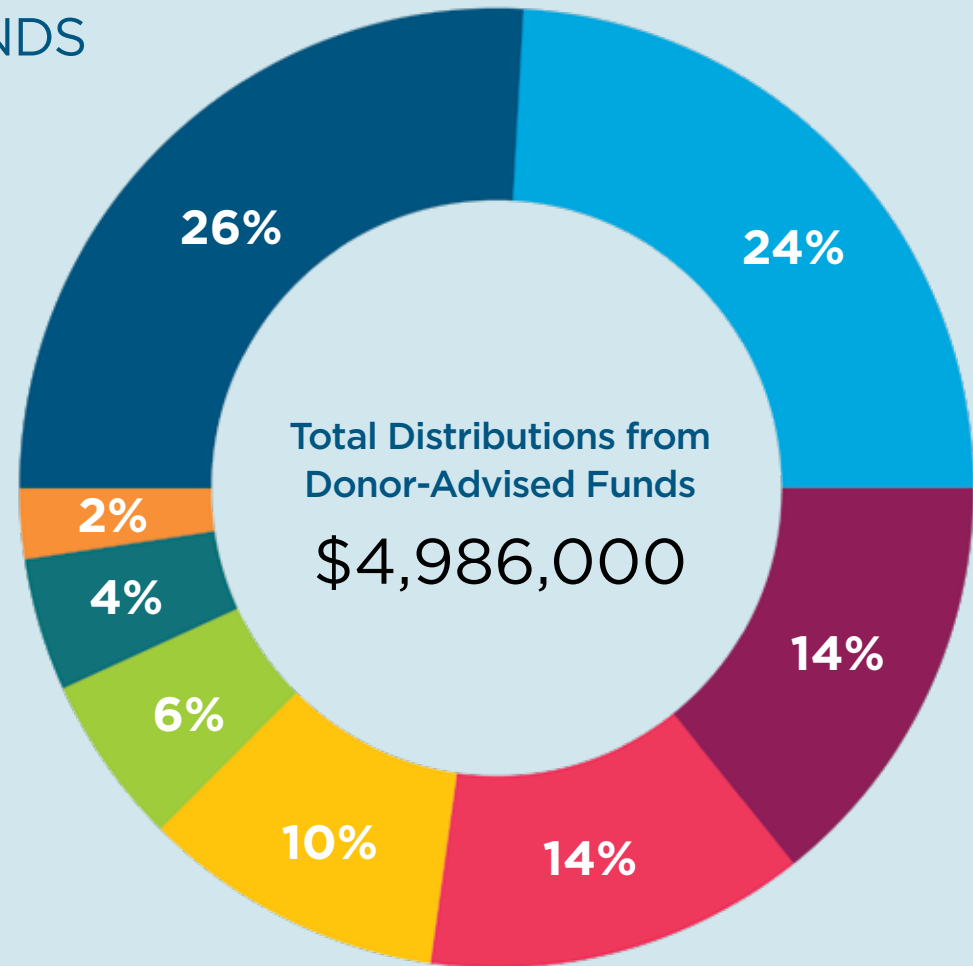
**Comprised of commingled funds invested with Chicago PEP, Boston CJEP, Vanguard, and Union Bank overseen by the Foundation Investment Committee. Does not include segregated assets, life insurance policies or charitable remainder trusts.



DONOR-ADVISED FUNDS

2017-2018 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.

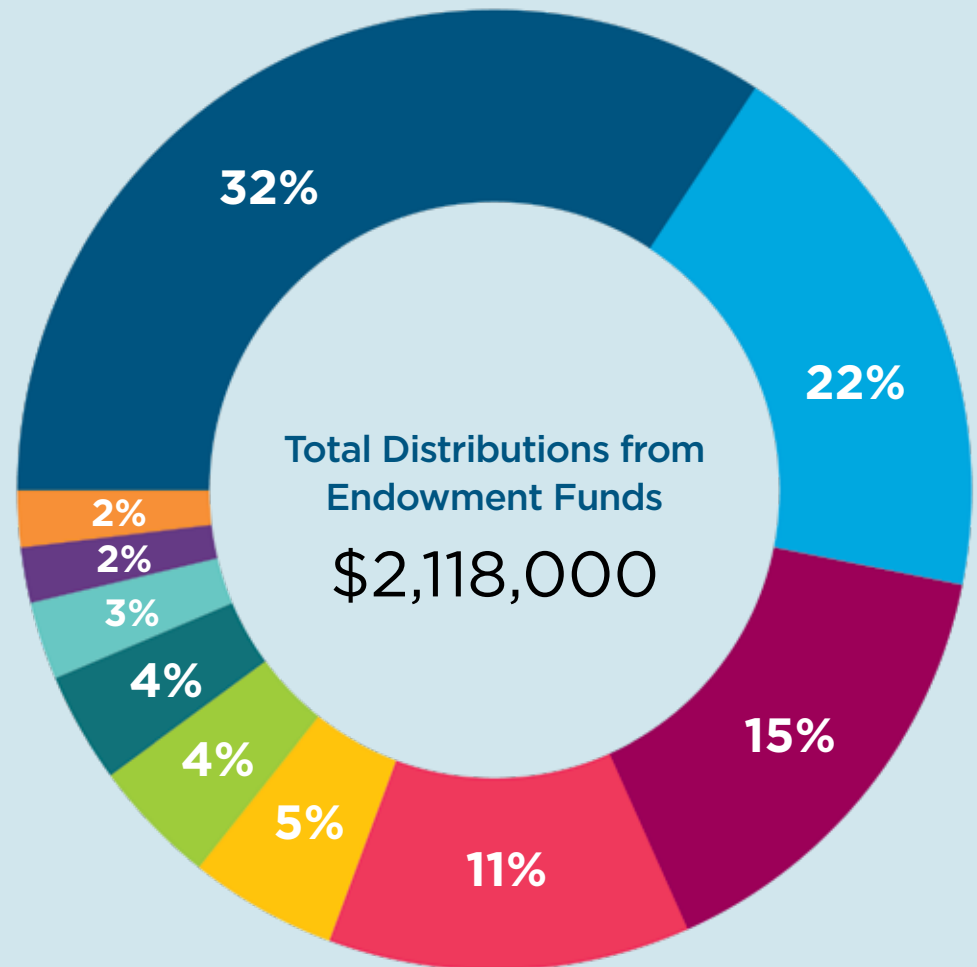


26%	Local Federation Agencies	\$1,275,000	10%	National Jewish Organizations	511,000
24%	Internal Donations to Foundation Funds	1,174,000	6%	Local Synagogues	323,000
14%	JFO Annual Campaign	694,000	4%	National Secular Organizations	208,000
14%	Local Secular Organizations	680,000	2%	Local Jewish Organizations	121,000

ENDOWMENT FUNDS 2017-2018 Fiscal Year

An Endowment Fund or a Supporting Foundation established with the Jewish Federation of Omaha Foundation allows you to create a permanent legacy and support the causes within the Jewish community that mean the most to you.

Disbursements from these funds support the Jewish Federation and its agencies, Omaha area synagogues and other local Jewish organizations, such as Friedel Jewish Academy and the Nebraska Jewish Historical Society.



32%	Jewish Social Services (RBJH/JSO/JFS)	\$678,000
22%	JFO Annual Campaign & Operating Income	462,000
15%	JFO Security & Campus Capital Improvements	309,000
11%	Scholarships	237,000
5%	JFO Agency Programming	111,000

4%	Local Jewish Organizations	94,000
4%	Sokolof Scholarships, Awards & Programs	88,000
3%	ADL & IHE	56,000
2%	LIFE & LEGACY Partner Incentives	45,000
2%	Other Jewish Organizations & Misc.	38,000

*Includes distributions from custodial and supporting foundation funds not on balance sheet.

Jewish Heritage Day at Werner Park



Lina Levit and Ninella Spivak on a Russian Cultural Trip to the Durham Museum

Sometimes it takes a little extra help to maintain independence. Help with meals or handyman services, personal care, transportation, or even medical or legal issues. Jewish Senior Outreach (JSO) provides that help. We empower seniors in Omaha to stay vital and active in their homes for as long as possible by providing options when independent living becomes more challenging.

JSO helps improve quality of life through proper nutrition, implementing safety precautions, home care referrals and financial assistance, if needed. Individuals and their families count on our outreach social workers as trusted partners.

Generous Malashock Gift

Fulfills Ever-Growing Need in the Senior Community

A recent conversation with **Dr. Edward and Sally Malashock** was an engaging trip through their past, a look at the present, and a view of the future. The Malashocks are warm, humorous and welcoming, and it is clear why their marriage has lasted 73 years. Their kindness also shines through, as evidenced by their very generous contribution to the Jewish Federation of Omaha Foundation to establish the Ed and Sally Malashock Jewish Senior Outreach Fund. This fund will support the new handyman and transportation services of Jewish Senior Outreach.

Sally and Ed said that they are more aware now of the ever growing need in the senior community for support, especially now that they are living with older people. They have become more aware of various degrees of physical and mental impairment. They also realize that not everyone in this category is capable of supporting themselves. It was apparent to them that there is a pressing and unmet need for further funding for the senior Jewish community. The Malashocks said they feel fortunate to be able to support the community, so they looked for the right opportunity to help.

Shelly Fox, Director of Admissions and Community Outreach at the Rose Blumkin Jewish Home, said, "The newly established Ed and Sally Malashock Jewish Senior Outreach Fund will help a growing segment of our community – the Jewish seniors who are living on their own and could benefit from help with transportation and basic handyman services. Our goal with Jewish Senior Outreach (JSO) is to serve the needs of our elders. We focus on helping our community members continue living on their own in a safe environment. We know how important it is to most folks to maintain their independence...and we want to partner with them in making that happen."

Ed said that his medical practice was the focus in his life, and yet he felt an obligation to participate in the Jewish and the general community. Both Sally and Ed have a very rich history of volunteering. Ed was active with hospital related activities and the medical school from which he graduated, where he was a volunteer faculty member. He was the president of the Clarkson Medical staff, and the president of the Douglas County Medical Society. Ed served on the Jewish Family Service, the Jewish Federation of Omaha and Temple Israel boards. Sally served on the Temple Israel board, was the president of the faculty wives, was on the Clarkson Hospital Service League, was the chairwoman of the Ak-Sar-Ben ball committee, was president of the Council of Jewish Women for many years, and still found the time to volunteer at their children's schools.

On behalf of the Jewish community, the Foundation expresses its heartfelt thanks to Ed and Sally for their commitment and contributions.



*...so do I plant for those who
will come after me.*



The *Goldstein* Legacy

Continuing the legacy left by their parents, Shirley and Buddy Goldstein, Donald Goldstein, Kathy Goldstein and Gail Raznick established five new endowment funds from their parents' estate. The new endowments are: the Goldstein Family Endowment for the Jewish Press, the Goldstein Family Endowment Fund for the Nebraska Jewish Historical Society, the Goldstein Family Endowment Fund for Friedel Jewish Academy, the Goldstein Family Endowment Fund for B'nai Israel Synagogue, and the Goldstein Family Endowment Fund for Chabad Lubavitch of Nebraska. These new endowments are for operational funding for the Press, NJHS, Friedel, and Chabad. The fund for B'nai Israel is to support the Council Bluffs synagogue.

Kathy, Gail and Donald have been able to ensure financial support to five Jewish organizations for an unlimited number of years into the future. The lessons they learned growing up and the examples set by their parents have generously benefited Omaha's Jewish community, in the past, now in the present, and for countless years ahead.



Gail Raznick, Don Goldstein, Kathy Goldstein

LIFE & LEGACY Program - *Coordinator Report 2018*

It has been an exciting year 4 for the LIFE & LEGACY™ program in our community. This year the Omaha Jewish community received a beautiful piece of original artwork from the Grinspoon foundation for successfully completing four years of the LIFE & LEGACY program and for integrating legacy giving into our community. This honor is shared with all of our 9 local partners, the Jewish Federation of Omaha and its agencies, ADL/CRC, Institute for Holocaust Education, Nebraska Jewish Historical Society, Chabad House, Friedel Jewish Academy, Temple Israel, Beth El Synagogue and Beth Israel Synagogue. This year once again all of our Partner organizations have reached or exceeded their individual goals and the community has received 633 signed commitment letters to which there were 325 individual legacy commitments with a cumulative estimated value of \$17.7 million dollars.

Of course, none of this would have been possible without the vision, leadership and support of our JFOF board and our generous donors. It is with gratitude and appreciation that we thank them for their commitment to the Harold Grinspoon Foundation LIFE & LEGACY initiative in Omaha's Jewish community.

This year we hosted our fourth LIFE & LEGACY community wide celebration event which was attended by over 100 guests who were enlightened by Rabbi Daniel Cohen, our keynote speaker, who shared his insights on "How to Live your Best Life Now."

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 financial future of our amazing Omaha Jewish community.



Very sincerely yours,

Margo Parsow
LIFE & LEGACY Coordinator



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!



Dennis and Pam DePorte, Jon and Denise Meyers

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
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
Pam & Dennis DePorte
Beth Seldin Dotan
Eric Dunning
Toba Cohen-Dunning
Penny Krasne Endelman
Harold Epstein
Howard & Sharon Epstein
Irving 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
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
Marcel & Ilse Kahn
Gary & Sally Kaplan
Myron Kaplan
Russ Kaplan
Beatrice Karp
Gloria C. Kaslow
Howard J. Kaslow
Cookie Katskee
Julee Katzman
Jeff & Sharon Kirshenbaum
Joe Kirshenbaum
Kevee Kirshenbaum
Donald S. & Delores Klein
Marsha A. Kleinberg
Milton M. Kleinberg
Sara & Ari Kohen
David Kohll
Janet Kohll
Howard M. & Sharon Kooper
Shane & David Kotok
Jack Kozlen
Alan & Deborah Kricsfeld
Janie Fox Kulakofsky
David & Debi Kutler
Howard & Nancy Kutler
K. Wayne & Carole A. Lainof
Randal Langdon

Sharon Comisar-Langdon
Barbara Lashinsky
Joanie Lehr
Sandy & John Lehr
Paula A. Lenz
Vincent P. Lenz
Steve & Bonnie Levinger
Rochelle Lewis
David Lieberman
Felicia & Scott Littky
Mario Lopez
Steve* & Thelma* Lustgarten
Diane & Larry Malashock
Dr. Edward & Sally Malashock
Jody & Neal Malashock
Chaya Sarah Malkah
Dan Marburg
Joan Krasne Marcus
Lisa Marcus
Bruce Meyers
Jon & Denise Meyers
Sue Meyers
Tina & Joe Meyers
Robert Y. Meyerson, M.D.
Troy & Jamie Meyerson
Dr. Sidney Mirvish*
Stanley & Evelyn Mitchell
Eli & Ann Modenstein
Ann Moskovits
Janie & Allan Murow
Bruce Muskin
Mary-Beth Muskin
Michael Muskin
Amy Nachman
Gary Nachman
Allison Newfeld
E. R. "Bob" Newman
Murray & Sharee Newman
Dr. Patricia Newman
Phyllis Newman
Allan S. Noddle

Patty Nogg
 Steve Nogg
 Susan R. Norton
 Andrea Olson
 Alan S. Parsow
 Carol S. Parsow
 Margo Frohman Parsow
 Robert* & Betty Perelman
 Vicki Perlmeter
 Bonnie Pfrenger
 Eric & Julie Phillips
 Gilda Pieck
 Marcia & Steve Pitlor
 James & Susan Polack
 Alan E. Potash
 Bruce Potash
 Linda Neumann-Potash
 Paul Rabinovitz
 David & Gretchen Radler
 Gail Goldstein Raznick
 Mary & Joel Rich
 Philip & Diane Rich
 Marty & Iris Ricks
 Ari Riekes
 Carl Riekes
 Margo Riekes
 Steven J. Riekes
 Zoë Riekes
 Bob Rifkin
 Jane & Harlan Rips
 Jonathan Rockman
 Stacey Rockman
 Silvia G. Roffman
 Debbie & Lloyd Roitstein
 Susan Rothholz
 Lynne-Carol Saltzman
 Rosalie* & Milton* Saylan
 Caryn & Marc Scheer
 Carol* & Ed Schneider
 Beth and Harley Schrager
 Jeffrey Schrager & Anne York Family
 Foundation
 Jeff Schweid
 Aviva Segall & Patrick McNamara
 Ted & Sarah Seldin
 Mr. and Mrs. Ben Shapiro
 Nate A. Shapiro
 Sherry & Larry Shapiro
 Len Burrell & Cantor Wendy Shermet
 Melissa & Michael Shrago

Aveva & Martin Shukert
 Gary Shyken
 Liat Shyken
 Paul Shyken
 Susann Shyken
 Michael & Andrea Siegel
 Esther Silver
 Denise C. Silverman
 Stanley* & Norma* Silverman
 Tootie Simon
 Gerald & Judy Simons
 Harriet Singer
 Nancy B. Skid
 Janet & Jerry Slusky
 Michael Staenberg
 Carolyn "Rocky" Stern
 Rabbi A. Brian Stoller
 David Keiser & Lillian Keiser Stoms
 Foundation
 Louri Sullivan
 Barry H. Summer
 Fred Tichauer
 Marilyn & Steven Tipp
 Basya Tsed
 R. Thomas Vann
 Irving & Gail Veitzer
 Norman & Joodi* Veitzer
 John & Donna Walter
 Jim & Esther* Wax
 Aaron Weiner & Therese Vaughn
 Harry M. Weiner
 Kathy Weiner
 Rabbi Yaakov & Ilana Weiss
 Benjamin & Anna* Wiesman Family
 Susan Fellman Witkowski
 Nancy L. Wolf
 Robert Yaffe
 Anna Yuz-Mosenkis
 Jeff Zacharia
 Renee Zacharia
 Steve & Kathy Zalkin
 Charlotte & Morley* Zipursky
 Sally & Jim Zipursky
 Deborah & Speedy (Dr. Eugene) Zweiback
 Rosie Zweiback & Mace Hack

Names as of December 21, 2018
 *Of Blessed Memory

Margo Parsow Named the 2018 Gail Littman Leadership Award Recipient

During the 2018 LIFE & LEGACY™ Create a Jewish Legacy Leadership Gathering in Springfield, Massachusetts, Omaha's own Margo Parsow was awarded the Gail Littman Leadership Award. The award was created to honor a LIFE & LEGACY coordinator who shares Gail Littman's passion for legacy giving, has worked to spread the legacy message, coaches and mentors partner organizations, facilitates legacy commitments and integrates legacy giving into the community culture.



Margo Parsow and Arlene Schiff

Howard Epstein stated, "As the coordinator of Omaha's LIFE & LEGACY program, Margo has done a stellar job. She has coordinated the efforts of nine separate Omaha Jewish organizations helping to secure more than 630 legacy commitments with an estimated value of \$18 million, numbers which far exceeded our goals."

This is the year to establish your Legacy.

Contact the Jewish Federation of Omaha Foundation today!

Howard N. Epstein
 Executive Director
 402-334-6466
hepstein@jewishomaha.org

Margo Parsow
 LIFE & LEGACY Coordinator
 402-334-6432
mparsow@jewishomaha.org

Omaha Jewish Alumni gather at Nebraska vs. Northwestern football game in Chicago



Gary and Lisa Epstein, Margo Parsow

The Omaha Jewish Alumni Association (OJAA) was created to help you reconnect with Jewish former Omahans.

This project is the amazing vision of Lisa and Gary Epstein whose generosity, inspiration and support have made the Omaha Jewish Alumni Association a reality. This is a great resource for interesting updates on the place you still call "Homaha!"

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 677 members and has hosted for its members two wonderful events this year; A Berkshire Hathaway luncheon for those visiting for the annual shareholders meeting and a Rosh Hashanah Tailgate/Cocktails and Conversations.



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. The Epsteins have shared that "so many people have such fun and wonderful memories of growing up in our fabulous Jewish community. It gave us the idea to create a Jewish alumni association where anyone who has grown up or attended school in Omaha, and has nostalgic feelings about our community, can connect through social media." www.facebook.com/OmahaJewishALumni

While the Epsteins anticipate that the bulk of membership will 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. Gary and Lisa are excited to see the continued success of the OJAA and the opportunities that they and other OJAA members will have to reconnect with old friends and hopefully meet new ones in the process.

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.

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 2018 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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