

Jewish TOMORROWS

2022
ANNUAL
REPORT

 JEWISH FEDERATION OF OMAHA
FOUNDATION



FOUNDATION LEADERSHIP

Torch is Passed



Howard Epstein and Amy Bernstein Shivers

After nearly ten years as the Executive Director of the Jewish Federation of Omaha Foundation, Howard Epstein retired in July. Howard officially passed the torch to Amy Shivers on July 20th.

After 15 years of practicing law, Howard replaced Marty Ricks, becoming the fourth Executive Director of the Foundation. Howard brought the Harold Grinspoon LIFE & LEGACY™ Initiative to Omaha. This Initiative has been extremely successful, with nearly 700 commitments and \$25 million in after-lifetime gifts. Howard has been an active community member throughout his life, and will continue to do so throughout his retirement. Although he is not completely certain about his long-range retirement plans, he does have plans for some travel. Howard will be missed by the staff and board of directors, and he is wished the very best in his well-earned retirement.

Born and raised in Omaha, Amy has been living in Chicago with her husband Eric and dog Ace. Amy spent over 20 years working for corporations. Amy held various demanding positions at Crain's Chicago Business from 2001 to 2019. In 2019 she moved to the non-profit world, as the Senior Regional Manager of Western Governors University. Amy has extensive experience in marketing, planning, communications, and strategic partnerships, among many other skills developed throughout her career. She will bring a new perspective to the director's position, and we are looking forward to building upon the strength that the previous four Executive Directors have established.



JEWISH FEDERATION OF OMAHA FOUNDATION

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

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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



Bob Belgrade

The Jewish Federation of Omaha Foundation serves the Omaha Jewish community, the greater Jewish community and other worthy charitable organizations. We have many tools to help you accomplish charitable giving and potential tax and estate planning needs. Please keep our Foundation in mind when you are working with your attorney or tax accountant. We are here to help.

Our long time Executive Director, Howard Epstein, retired in July after ten years of leading our Foundation. We continue to be thankful for Howard's tremendous years of service growing and managing our Foundation. We are also grateful for his assistance in helping the transition to our new Director.

We welcome our new Executive Director, Amy Bernstein Shivers back to Omaha. We feel fortunate to have found a great fit with Amy. She is already leading new initiatives to help grow our Foundation and continuing to reach out to connect and educate people interested in helping others.

We told Amy that she could not walk into a better situation when entering a new position. She has an experienced and wonderful staff in the office. Laurie Peatrowsky, Linda Pollard, Diane Walker and Jay Katelman are all terrific folks who do a great job every day. Our previous two Executive Directors Marty Ricks and Howard Epstein are readily available. We also have a seasoned Board of Directors who are a consistently good resource. Amy

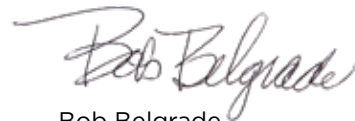
is off to a strong start and you are welcome to reach out – even to just say, hello.

Please continue to look through this annual report. Because of the foresight of our donors, you can see the impact of their generosity over time. A majority of funds distributed each year from endowment funds and donor-advised funds goes to support our Omaha synagogues, Jewish scholarships and Jewish organizations.

I continue to be blown away by the generosity of former members of our community. Be sure to check out the donor spotlight on page 26 about Alan J. Levine. I have been told that Alan and my mother were classmates at Central High School. It is great to see that Alan held Omaha close to his heart even decades after moving to California.

Next, we will celebrate the 40th Anniversary of our Jewish Federation of Omaha Foundation. You may have noticed our new logo revealed on the front cover. A lot of you have been involved from the beginning and we thank you. During the celebration, we invite everyone to join us in sharing stories and experiences; under the theme: Embracing Philanthropy.

The Foundation strives to continue to be mutually beneficial to both you and your charitable causes. We thank you for your interest and continuing support!



Bob Belgrade
Board President

A MESSAGE FROM THE EXECUTIVE DIRECTOR

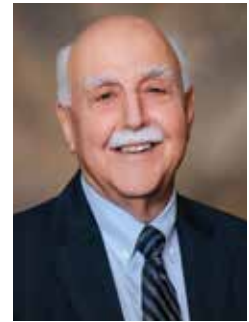
This is my tenth annual message to you as Executive Director of the Jewish Federation of Omaha Foundation. It will also be my last annual message. In late July 2022, I passed the leadership torch to the Foundation's new Executive Director, Amy Shivvers, and I know you will join me in welcoming Amy.

As I move into retirement, I reflect upon the last ten years, undoubtedly the most rewarding and satisfying years of my professional career. The Foundation has grown and prospered during those years, thanks to the generosity and inspiration of the Foundation's growing number of donors and supporters, our officers, board members, and exceptional, hard-working staff.

Omaha is one of the most philanthropic, charitable cities in the entire country, and our Omaha Jewish community is an important and vital component. We continually rank in the top five among Jewish communities in per capita giving. Thanks to you, we make a substantial impact on the financial stability of Jewish life in Omaha.

During the past ten years, which ended June 30, 2022, the Foundation's assets under management increased by 83% to a total of \$113 million, the number of endowment and donor-advised funds and supporting foundations increased by 63% to a total of 683 funds, and Omaha's LIFE & LEGACY™ initiative, coordinated by the Foundation, generated support from 338 unique donors who have made commitments for over 679 gifts with an estimated value of over \$25 million. Most importantly, during these past ten years, the Jewish Federation of Omaha Foundation distributed a total of \$61 million from endowments, donor-advised funds and supporting foundations to a multitude of charitable causes in Omaha's Jewish community and beyond. This fiscal year alone, the Foundation allocated \$7 million in support of the Federation campaign, Federation and Federation agency operations and programs, scholarships for college, summer camps, Israel trips, childhood education, and so much more throughout Omaha's Jewish and broader secular communities, throughout the United States, and in support of Jews in Israel, the Ukraine, and other overseas locales.

A special note of thanks goes to our Foundation Board, led by President Bob Belgrade. Bob is always ready and willing to provide advice and insight and to use his efforts to move the Foundation to the highest levels. It has been my pleasure to work with Bob during his presidency, at the same time continuing and building our strong friendship. Thanks also to the other board members who continue to play pivotal roles in overseeing the growth, development and direction of the Foundation. Collectively, the



Howard Epstein

19 Foundation board members willingly give of their time, talent and treasure to make Omaha's Jewish community very special. Long-time Foundation Investment Committee Chairman Murray Newman is one of those dedicated board members. Murray deserves special recognition on his many years of involvement, guidance and expertise as he hands over the reins of the Investment Committee to Ted Friedland.

I tip my hat to the Foundation's exceptionally professional staff. They are committed to the growth and success of the Foundation, and deserve considerable credit for all our accomplishments. This dedicated group includes Operations Manager Laurie Peatrowsky, Fund and Scholarship Administrator Diane Walker, LIFE & LEGACY and Omaha Jewish Alumni Association Coordinator Jay Katelman, and Endowment Assistant/Staff Writer Linda Pollard.

Wishing you all the best,

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

Howard N. Epstein
Executive Director

THE WALTER AND HELENA TICHAUER HOLOCAUST SURVIVORS REFLECTION GARDEN

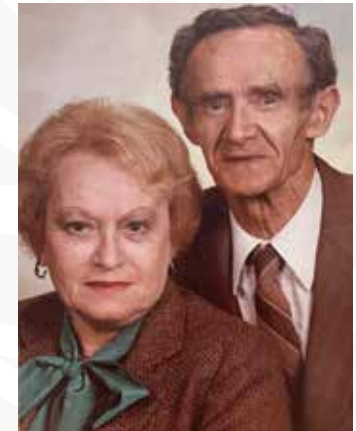
To pay homage to his parents, Fred Tichauer committed funds to the Jewish Federation of Omaha Foundation to create the Walter and Helena Tichauer Holocaust Survivors Reflection Garden on the JCC campus. Fred also established the Walter and Helena Tichauer Memorial Endowment for the Institute for Holocaust Education at the Jewish Federation of Omaha Foundation to cover future repair and maintenance costs of the garden. Fred said that initially, he did not plan on a memorial garden, but in discussing various opportunities to honor his parents, a memorial garden occurred to him. He said, "I hope it will become a peaceful and beautiful spot for special events, and for anyone to sit, reflect, and dream. I could not think of a more appropriate memorial." Fred said, "We wanted the garden to be a memorial for them, but there's more. We also want to ensure the memories of the 6,000,000 Jews and others that perished in the Holocaust will never be forgotten."

Helena Schulkind was born and raised in Krakow, Poland and was 16 years old at the start of World War II. Helena's family spent a year in the ghetto before being sent to different camps. Helena and her father, mother and grandmother were sent to Plaszow concentration camp. Her brother was sent to Auschwitz. Helena's father, brother and grandmother did not survive the camps. Towards the end of the war, Helena and her mother were sent to Auschwitz, then Bergen-Belsen and Birkenau for a short time. They then returned to Bergen-Belsen and remained there until the liberation. After the liberation, they went to Hamburg, Germany. In July 1945 they went to Sweden, where they stayed for another year before settling in Montevideo, Uruguay with an uncle.

Walter Tichauer was from Gliwice, Germany and was able to immigrate to Uruguay shortly after the war started. Walter was a talented glazer and learned his craft at a prestigious school in Germany, and was quite successful in Montevideo. Walter's family perished in the war. Montevideo is where Helena met Walter. Helena and Walter were engaged a month after meeting, and married three months later. Helena and Walter had two sons, Carl and Fred.

Walter and Helena moved to Omaha in June 1963, where Helena's sister Lola lived.

Despite their losses, the Tichaurs never gave up and never succumbed to self-pity. They raised a family, and created new and promising lives for their sons in America. "They taught us about perseverance, hard work, being ethical, and doing right by people, and most of all, they used to tell me that we could do anything we wanted in this country," Fred said. "I know I am a product of the American dream because of them. They lost their freedom but regained it and made the best of their unfortunate situation. I am so proud of what they accomplished."



Helena and Walter Tichauer



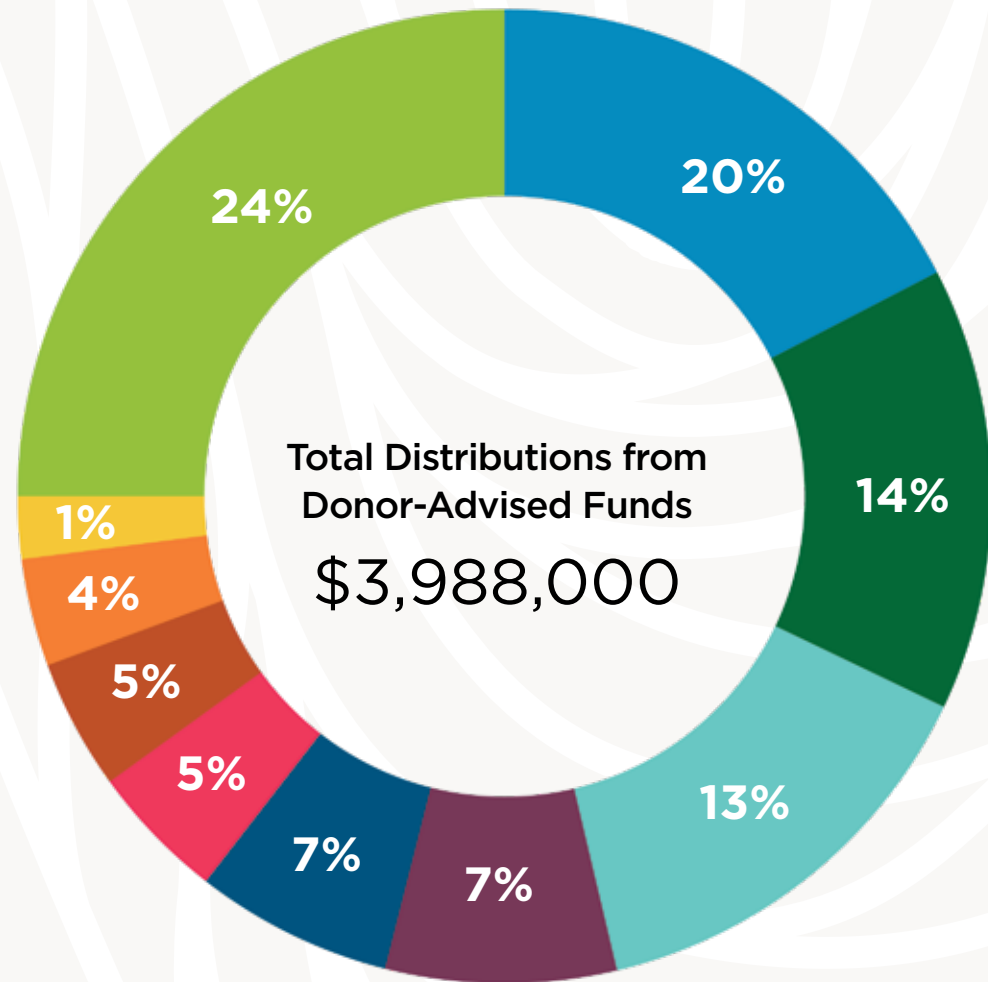
HOLOCAUST SURVIVORS
Reflection Garden

The Foundation sincerely thanks Fred Tichauer for his generosity and thoughtfulness. The Reflection Garden will be a place of comfort and quiet meditation for all in the community for many years to come.



DONOR-ADVISED FUNDS 2021-2022 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.

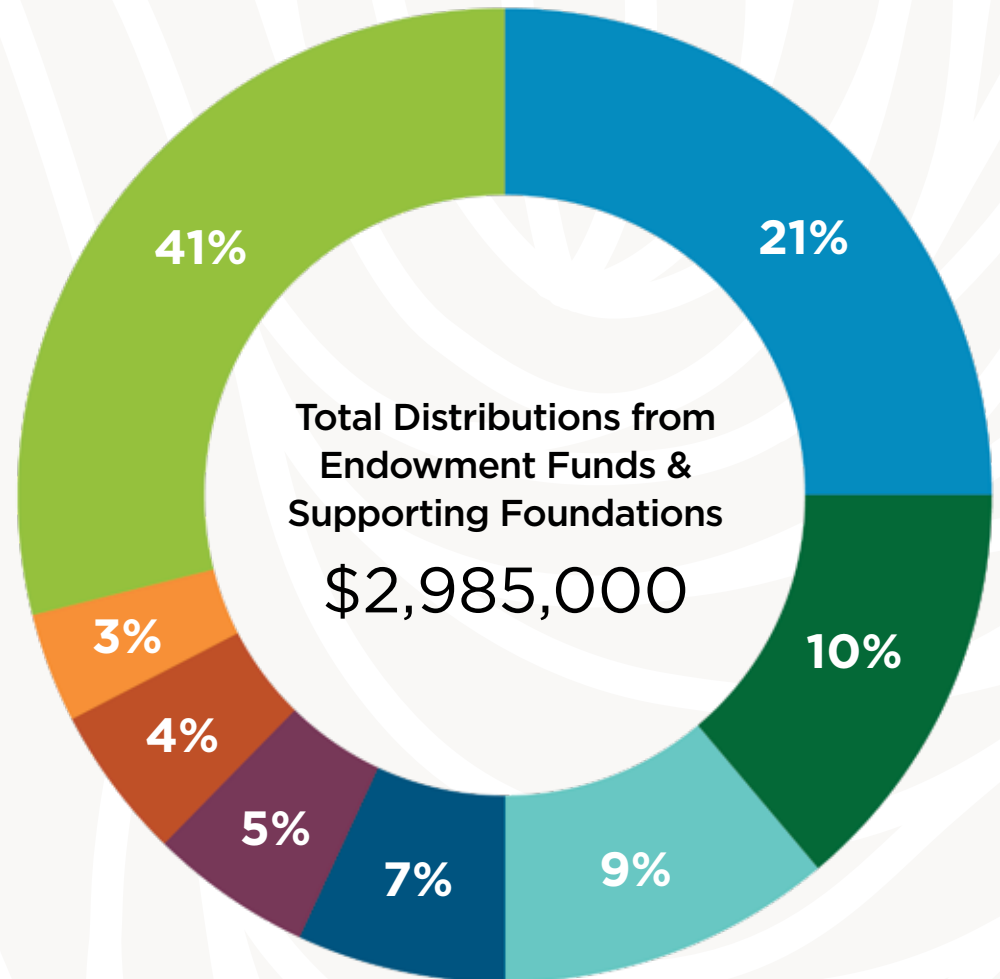


24%	Local Secular Organizations	\$956,000	7%	National Jewish Organizations	265,000
20%	JFO Annual Campaign	810,000	5%	JCC Campus Renovation	212,000
14%	Local Synagogues	560,000	5%	Local Jewish Organizations	205,000
13%	Internal Donations to Foundation Funds	500,000	4%	Local Federation Agencies	150,000
7%	National Secular Organizations	280,000	1%	JFO Ukraine Campaign	50,000

ENDOWMENT FUNDS 2021-2022 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.



41%	Jewish Social Services (RBJH/JSO/JFS)	\$1,230,000
21%	JFO Annual Campaign & Operating Income	633,000
10%	Local Jewish Organizations	287,000
9%	Scholarships	269,000

7%	JFO Agency Programming	190,000
5%	Sokolof Scholarships, Awards & Programs	150,000
4%	Outside Organizations	130,000
3%	JCC Programs & Building Improvements	96,000

FOUNDATION *Impact*

- The OJAA Fundraiser held at Topgolf sold out for the second year in a row and raised \$8,000 for Pennie Z. Davis Early Learning Center Scholarships
- The Foundation Grants Committee approved **\$70,000** in grants to Jewish Federation agencies, local synagogues and Jewish organizations
- **LIFE & LEGACY** has received **679** signed commitments with an estimated dollar value of over **\$25 million**



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

- Beverly K. and Millard R. **Seldin** 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
- Kevee **Kirshenbaum** LIFE & LEGACY Endowment
- Isadore H. and Rose K. **Weiner** Trust Fund
- Eli M. and Sara **Zalkin** Endowment



FUNDS PROVIDING INCOME FOR DESIGNATED PURPOSES OF THE JEWISH FEDERATION OF OMAHA AND ITS AGENCIES

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

JEWISH COMMUNITY CENTER

B'NAI B'RITH YOUTH ORGANIZATION

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

PENNIE Z. DAVIS EARLY LEARNING CENTER

- Pennie Z. **Davis** CDC Staff Education Fund
- Eileen S. **Erman** Child Development Center Endowment
- Ike and Roz **Friedman** Foundation JCC Preschool Playground Equipment Fund
- Arthur H. and Ruth M. **Goldstein** Family Endowment
- Robert M. **Nelson** Scholarship Endowment (Future Fund)
- Ernie and Adalynn **Nogg** Memorial Endowment
- Suzanne **Richards Singer** Endowment
- Harold S. **Tuchman** Family Endowment
- Allen and Monie **Zalkin** Memorial Endowment
- JCC Child Development Center Endowment
- Omaha Early Childhood Jewish Learning Grants Fund

JCC PROGRAMMING & OTHER PURPOSES

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

JEWISH SOCIAL SERVICES

JEWISH SENIOR OUTREACH

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



JEWISH SOCIAL SERVICES

ROSE BLUMKIN JEWISH HOME

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

- Betty **Marx** Activities Endowment
- **Meyers** Family Legacy of Laughter Endowment
- Leo I. and Helen P. **Meyerson** RBJH Endowment
- Dan **Miller** Endowment
- Dr. Daniel and Harriet **Miller** Memorial Endowment
- **Parsow** Family Endowment
- Janet S. and Stanley E. **Perlmeter** Memorial Courtyard Maintenance Fund
- Shelly **Nogg Pichik** Field Trip Fund
- David S. **Rice** and Esther **Zorinsky Rice** Endowment for RBJH
- Charlotte and Eugene **Rich** Endowment
- Samuel and Bess **Rothenberg** Transportation Fund
- Rosalie and Milton **Saylan** Endowment
- Jack J. and Sonia **Schrager** Endowment
- Ted and Sarah **Seldin** Family RBJH Activities Endowment
- Helen and David **Shukert** L.O.V.E. Scholarship Fund
- Norma and Stanley **Silverman** Endowment
- 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
- Rose Blumkin Jewish Home Medicaid Supplement Fund

JEWISH FAMILY SERVICE

- Paul **Alperson** Endowment
- Steven **Bloch** President's Fund
- Pennie Z. **Davis** Family Life Education Fund
- Nathan and Rose Lillian **Fine** JFS Tzedakah Fund
- Ike **Friedman** JFS Financial Assistance Fund
- Louis **Friedman** Fund for New Americans
- **Glazer** Family Endowment
- Edith and Paul **Goldstein** Endowment
- Samuel and Delma **Goodman** Youth Fund
- Paul and Joy **Grossman** Family Endowment
- **Harris** Family Endowment
- Jennifer Beth **Kay** Memorial Fund
- Sol **Kutler** Dental Fund
- Richard "Pete" **Lee** Memorial Endowment
- Ruth and Otmar **Liebenstein** JFS Financial Assistance Endowment
- **Lieberman** Family of Scottsbluff, Nebraska Endowment Fund for Special Needs Population
- **Lippett** Family Endowment
- Jerome J. and Frances O. **Milder** Endowment
- Nancy **Noddle** JFS Financial Assistance Fund
- **Parsow** and **Simons** Families Special Needs Community Fund
- **Perlmeter** Family Jewish Family Service Assistance Fund
- Ruth and Bernard **Raskin** Endowment
- Leo and Frances **Rodick** Memorial Endowment
- Craig **Saylan** Memorial Endowment
- Rosalie and Milton **Saylan** Endowment for JFS
- Mickey (**Sturm**) **Stern** Memorial Endowment
- Harry and Fannie **Stock Rothkop**/Theodore **Rothkop** Endowment
- Mark and Sophie **Sturm** Immigrant Education Fund
- Jake and Mary **Wine** Fund
- Yachad Endowment



JEWISH FEDERATION OF OMAHA

JEWISH FEDERATION KRIPKE LIBRARY

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

JFO PROGRAMMING & OTHER PURPOSES

- Milton R. and Pauline S. **Abrahams** Endowment
- Sandra **Belgrade** Memorial Professional Development Endowment
- Ruth **Frisch** and Oscar S. **Belzer** Endowment
- Dr. Bernard H. **Bloom** and Dr. Bruce S. **Bloom** Memorial Endowment
- Bruce **Fellman** Memorial Young Leadership Award Endowment
- JFO **Friedland Steiner Boggust** Endowment
- **Glazer** Family Charitable Fund
- Arthur H. and Ruth M. **Goldstein** Family Endowment
- Paul and Edith **Goldstein** Family Endowment
- Robert and Ellen **Gordman** Jewish Teen Leadership Fund
- Robin & Bennett **Greenspan** Hall of History Featured Exhibit Endowment
- Philip M. and Ethel **Klutznick** Program for Studies in Jewish Civilization Fund
- Aaron H. and Ruth **Somberg Krantz** Fund
- Sadie and Harry **Kulakofsky** Memorial Fund
- Alan J. **Levine** Building Fund
- Avy L. and Roberta L. **Miller** Family Film Fund
- Gertrude T. and Albert B. **Newman** Endowment
- Morton A. **Richards** Endowment
- Morton A. **Richards** Youth Endowment
- Samuel and Bess **Rothenberg** Memorial Endowment

- Lois Jeanne **Schrager** Memorial Fund
- Frederick J. **Simon** Memorial Endowment
- Kenneth Ray **Tretiak** Memorial Fund
- Federation LIFE & LEGACY Endowment
- Jewish Genetic Testing Endowment
- Lay Seminar Fund
- Youth Foundation Fund

SCHOLARSHIPS

- Lenore **Simon Aronson** Educational Fund
- David E. **Beber** Scholarship Fund
- Truman and Rosemary **Clare** Scholarship Endowment
- Henry A. **Davis** Custodial Fund
- Leo and Aileen **Eisenstatt** Scholarship Fund
- Barry E. **Epstein** Memorial Healthcare Fund
- **J.W.V. Epstein – Morgan Post #260 – Nathan Marcus** Memorial Scholarship Fund
- Sandra L. **Feldman** Memorial Scholarship Fund
- Nathan and Rose Lillian **Fine** Fund for the Education of Students of the Jewish Faith
- Alan and Annie **Fleishman** Scholarship Fund
- David W. and Minnie **Frank** Memorial Scholarship Fund
- Jacob **Friedman** and Betty **Tarnoff Friedman** College Scholarship Endowment
- Rebecca **Friedman** Scholarship Fund
- Carl L. **Frohm** Educational Custodial Fund
- Randy and Marvin **Gilman** Scholarship Fund
- Ann **Goldstein** Education Programming Endowment Fund
- Gary and Barbara **Goldstein** Jewish Youth Camp Fund
- Leonard and Shirley **Goldstein** Family Endowment
- Herbert **Goldsten** Scholarship Fund
- Samuel and Delma **Goodman** Youth Fund
- Dr. Abe **Greenberg**/B'nai B'rith/**Henry Monsky Lodge** Endowment
- Nancy and Don **Greenberg** Scholarship Fund
- Ann & Arthur **Grossman** Scholarship Fund
- **Harris** Family Endowment
- Ellen **Canar Joseph** Memorial Endowment
- Samuel and Ida **Kaiman** Endowment
- Ben E. **Kaslow** Scholarship Fund
- David **Katzman** Endowment
- Maxine and Joe **Kirshenbaum** Scholarship Fund
- Stanley & Barbara **Malashock** Camp Scholarship Endowment Fund
- Betty **Margel** Scholarship Endowment
- David J. and Sue **Meyers** Jewish Experience Scholarship Endowment
- John H. **Mosow** and Ellin B. **Siegel** LIFE & LEGACY Endowment
- Albert M. and Jeanette T. **Nepomnick** Educational Fund
- Carolyn **Kully Newman** Memorial Fund
- Esther K. **Newman** Memorial Fund
- Gertrude T. and Albert B. **Newman** Endowment
- Jewish Federation of Lincoln Judge Ben **Novicoff** Scholarship Fund
- David S. **Rice** and Esther **Zorinsky Rice** Endowment
- Joe M. and Ruth E. **Rice** Scholarship Fund
- Carl & Zoë **Riekes** Scholarship Endowment Fund
- Dorothy **Lustgarten Riekes** Childrens' Cultural Arts Endowment
- **Riekes** Family Jewish Youth Educational Endowment
- Burton L. **Robinson** Student Athlete Scholarship Fund
- Jerold I. and Sheila E. **Rosen** Endowment
- Lois Jeanne **Schrager** Memorial Fund
- Phillip and Terri **Schrager** Supporting Foundation
- Nate H. and Beatrice **Sherman** Scholarship Fund
- Ruth **Sokolof** Special Education Scholarship Fund
- Benjamin and Elizabeth "Bess" **Stern** Scholarship Fund
- Lillian **Keiser Stoms** Educational Fund
- David **Keiser** and Lillian **Keiser Stoms** Foundation Education Endowment
- David **Keiser** and Lillian **Keiser Stoms** Foundation Education Endowment for Academic Excellence



- Edward **Zorinsky** Endowment
- Ahava Dan Jewish Community Engagement Fund
- CornerStones Fund
- Passport to Israel Program Fund
- Pay It Forward Endowment

ESTABLISHED FUNDS DESIGNATED FOR THE JEWISH FEDERATION ANNUAL CAMPAIGN

- Norman B. and Frances P. **Batt** PACE Fund
- Robert **Belgrade** PACE Fund
- Sandra **Belgrade** LOJE Fund
- Herbert M. **Berkowitz** Memorial PACE Fund
- Dr. Mark **Brodkey** PACE Fund
- Leo and Aileen **Eisenstatt** PACE/LOJE Fund
- 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
- Milton S. & Corinne N. **Livingston** PACE Fund
- Dr. Sidney **Mirvish** Memorial PACE Fund
- Bettie and Stuart **Muskin** PACE Fund

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

ESTABLISHED FUNDS DESIGNATED FOR THE ONGOING MAINTENANCE OF FEDERATION FACILITIES

- Milton Mendel & Marsha **Kleinberg** Hall of History Maintenance, Repair and Replacement Endowment
- Susie and Mike **Norton** Federation Campus Maintenance Endowment Fund
- **Riekes** Family Federation Campus Maintenance Endowment Fund
- Michael **Staenberg** Campus Repair, Renovation and Replacement Endowment Fund
- Benjamin and Anna E. **Wiesman** Family Reception Room Maintenance Endowment
- 2020 JFO Facilities Repair & Replacement Endowment

JEWISH FEDERATION OF OMAHA FOUNDATION

- David and Helen **Brodkey** Endowment for the Foundation
- Yale **Richards** Professional Education Endowment
- Ted and Sarah **Seldin** LIFE & LEGACY Endowment
- Pardes Foundation

LIFE & LEGACY FUNDS (MULTI-PURPOSE)

Funds supporting more than one partner (Funds benefitting one sole partner listed in respective category.)

- Sandra **Belgrade** LIFE & LEGACY Endowment
- Elliot **Brown** LIFE & LEGACY Endowment
- Arthur and Betsy **Davidson** LIFE & LEGACY Endowment
- Gary and Barbara **Goldstein** LIFE & LEGACY Endowment
- Carole **Lainof** LIFE & LEGACY Endowment
- Steve and Thelma **Lustgarten** Endowment
- Jody and Neal **Malashock** Endowment
- Bruce **Meyers** LIFE & LEGACY Endowment
- Robert and Betty **Perelman** Endowment for the Federation
- Vicki **Perlmeter** LIFE & LEGACY Endowment
- Denise **Silverman** LIFE & LEGACY Endowment
- Stanley and Norma **Silverman** LIFE & LEGACY Endowment

SUPPORTING FOUNDATION AND SPECIAL GRANTS COMMITTEES

- Albert and Eleanor **Feldman** Family Israel Supporting Foundation
- Shirley and Leonard **Goldstein** Supporting Foundation
- Bennett G. **Hornstein** Endowment
- Karen **Sokolof Javitch** Music Fund
- Milton S. and Corinne N. **Livingston** Foundation Fund
- Carolyn **Kully Newman** Memorial Fund
- Esther K. **Newman** Memorial Fund
- Murray H. and Sharee C. **Newman** Supporting Foundation
- Phillip and Terri **Schrager** Supporting Foundation
- Lazier L. and Harriet B. **Singer** Memorial Fund for Youth
- Phil and Ruth **Sokolof** Honor Roll Fund
- Special Donor-Advised Fund

MULTI-PURPOSE FUNDS & OTHER

- Jane H. and Rabbi Sidney H. **Brooks** Conversations for Change Series Endowment Fund
- Robert **Eisenberg** Endowment
- Etta & Harold **Epstein** Security Fund
- Beverly **Fellman** Best French & Best Hebrew Award Endowment
- Jean **Finnell Henderson** Memorial Scholarship Fund
- Heartland Holocaust Educational Fund (Frances and Sam **Fried**)
- Ann **Goldstein** Outstanding Young Leader Award Endowment
- Gary **Javitch** Family Endowment
- Robert I. **Kully** Endowment
- Louis S. **Kully** and Debra J. **Kully** Endowment for Mt. Sinai Cemetery in Hastings, NE
- Alan J. **Levine** Program Endowment
- **Lieberman** Family Scholarship for Scottsbluff High School Endowment
- **Livingston** Plaza Custodial Fund
- Yale **Richards** Memorial Endowment
- Vivian and Morton **Schwarz** College Scholarship Fund
- Sigma Alpha Mu University of Nebraska Scholarship Fund

FUNDS MANAGED FOR THE JEWISH FEDERATION OF OMAHA

- Mickey & Fran **Coren** Family Fund for the Jewish Federation of Omaha
- Arthur L. and Betsy **Davidson** Emergency Assistance Endowment Fund for Jewish Federation of Omaha
- David W. and Minnie **Frank** Scholarship Fund Endowment for the Jewish Federation of Omaha
- Gary and Barbara **Goldstein** Endowment for the Jewish Federation of Omaha
- Marcel and Ilse **Kahn** Endowment for the Jewish Federation of Omaha
- Phil and Marian **Kutler** Endowment for the Jewish Federation of Omaha
- Stuart and Sandy **Kutler** Omaha BBYO Leadership Development & Programming Excellence Endowment
- Alan M. **Rosen** Theater Maintenance Endowment for the Jewish Federation of Omaha
- Carol and Edward **Schneider** Legacy Endowment for the Jewish Federation of Omaha

SUPPORT FOR PARTNERS / AFFILIATES / OTHER ORGANIZATIONS

ANTI-DEFAMATION LEAGUE

- ADL LIFE & LEGACY Endowment

JEWISH COMMUNITY RELATIONS COUNCIL

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



BETH EL SYNAGOGUE

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

BETH ISRAEL SYNAGOGUE

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

B'NAI B'RITH/HENRY MONSKY LODGE

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

B'NAI ISRAEL SYNAGOGUE (Council Bluffs, IA)

- **Goldstein** Family Endowment for B'nai Israel Synagogue
- Sissy **Silber** LIFE & LEGACY Endowment for B'nai Israel Synagogue
- B'nai Israel Synagogue LIFE & LEGACY Endowment

CHABAD LUBAVITCH OF NEBRASKA

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



FRIEDEL JEWISH ACADEMY

- **Cohen** Family Endowment in Honor of Denise Bennett
- Nathan and Rose Lillian **Fine** Endowed Teacher of the Friedel Jewish Academy
- Leonard L. and Phyllis J. **Friedel** Family Endowment
- **Goldstein** Family Friedel Jewish Academy Endowment
- Roxann **Lebowich Lavorato** Memorial Endowment
- Eli and Rose **Schupack** Library Endowment
- Emergency Assistance Fund for Friedel Jewish Academy
- Friedel Future Fund

INSTITUTE FOR HOLOCAUST EDUCATION

- Beatrice **Karp** LIFE & LEGACY Fund for IHE
- Paula and Vince **Lenz** Endowment for IHE
- **Lieberman** Family of Scottsbluff, Nebraska LIFE & LEGACY Endowment Fund for Holocaust Education
- **Stenberg** Family Holocaust Education Scholars Program Fund
- Walter & Helena **Tichauer** Memorial Endowment for the Institute of Holocaust Education
- Institute for Holocaust Education Endowment Fund
- Institute for Holocaust Education LIFE & LEGACY Endowment

JEWISH FEDERATION OF LINCOLN

- Jewish Federation of Lincoln Custodial Fund

NEBRASKA JEWISH HISTORICAL SOCIETY

- Bob **Belgrade** NJHS Endowment
- **Goldstein** Family NJHS Endowment
- Gerald and Pearl **Osoff Gross** Endowment
- David and Rose **Katzman** Endowment
- Henry and Dorothy C. **Riekes** Museum Maintenance Endowment
- Henry and Dorothy C. **Riekes** Museum Occupancy Endowment
- Stuart Richard **Rochman** Memorial NJHS Endowment
- Rosalie and Milton **Saylan** NJHS Endowment
- Mickey and George **Shafer** Endowment Fund for NJHS
- Marlene W. **Hechtman** and Martin M. **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

- Joanne & Jerry **Freeman** LIFE & LEGACY Endowment
- Temple Israel LIFE & LEGACY Endowment

GIFTS THAT MATURE IN THE FUTURE

Charitable Remainder Trusts:

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

IN MEMORY OF OUR FOUNDATION DONORS WHO PASSED AWAY IN 2021-2022 (July 1, 2021 – June 30, 2022)

Elaine Feldman

Sandra L. Feldman Memorial Scholarship Fund

Jerry Freeman

Joanne and Jerry Freeman LIFE & LEGACY Endowment Fund

Kevee Kirshenbaum

Kevee Kirshenbaum LIFE & LEGACY Endowment

Edward Malashock

Ed and Sally Malashock Senior Outreach Fund

LIFE & LEGACY

Jerry Freeman

Gilda Pieck

Joseph Kirshenbaum

Kevee Kirshenbaum

Diane Malashock

Edward Malashock

FOUNDATION *Impact*

- **\$1.4 million** to support the Jewish Federation Annual Campaign and operations from donor-advised and endowment funds
- Programs that received support from the Foundation include **JFS Counseling, Friedel Jewish Academy 6th Grade Connection Trip, JFO Backyard Concert Series, Institute for Holocaust Education WWII Speakers Series, Beth El Synagogue Kamp KEF**



LION OF JUDAH ENDOWMENT

A Lion of Judah Endowment (LOJE) Fund is created by establishing a fund of at least \$120,000 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:

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



Andi Goldstein, Patty Nogg, Sandy Nogg,
Nancy Noddle and Carol Parsow



Joe Kirshenbaum, Jeff Kirshenbaum
and Maxine Kirshenbaum

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

**Of blessed memory*

PAST FEDERATION LEADER GIVES BACK TO OMAHA



Ellie Penner

“Establishing a PACE fund allows me to say “thank you” to the Jewish community of Omaha for providing the many opportunities for growth,” stated Ellie Penner. Never forgetting her years in Omaha and the importance of the Jewish Federation Annual Campaign, Ellie chose to give back to this community. Ellie was a former Women’s Campaign Division Director of the Jewish Federation of Omaha. Ellie is a native of Younkers, New York, and currently lives in Overland Park, Kansas.

Ellie lived in Omaha for 30 years and worked for the Federation from the fall of 1985, to the fall of 1990. She served as the Federation Women’s Division Director, coordinating the Super Sunday campaign, and the annual meeting. She also directed a year-long young leadership training program, a Midwest Women’s Mission to Israel, and coordinated the Welcome to Omaha program.

Upon moving to Omaha in 1969, Ellie became a very active volunteer in the community. She served on the Board of Directors and as president of the Omaha NCJW Section, and as secretary of NCJW’s Central District. Ellie was on the JCC Board and was Chair of the JCC Membership and Dance Committees. She also served on the JCC and Jewish Federation Nominating Committees, the Federation’s Budget & Allocation Committee, and on the Federation Board of Directors. Teaming up with others, Ellie worked on implementing the first Teen Trip to Israel in 1987. In the greater Omaha area, Ellie served on the board and then as President of Planned Parenthood of Omaha/Council Bluffs.

Jan Goldstein worked with Ellie in the early 1990’s for a short time while Ellie trained her for the Federation Women’s Division Director position. Jan said, “She (Ellie) is doing what she asked others to do and what has been important to her throughout her life, ensuring the continuity of a strong Jewish Community, here in Omaha and for the Jewish people.”



Dr. Edward Malashock passed away in May 2022, at age 99, and three years after his beloved wife, Sally. He is survived by sons Jim and Mark, daughter Jan Egermayer, and six grandchildren.

Ed and Sally Malashock established the Ed and Sally Malashock Jewish Senior Outreach Fund at the Jewish Federation of Omaha Foundation. Shelly Fox, Director of Admissions and Community Outreach at the Rose Blumkin Jewish Home, said, "The Ed and Sally Malashock Jewish Senior Outreach Fund helps 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."

Both Sally and Ed were born and raised in Omaha. The Malashocks were married in 1944. After medical school Ed served in the US Army Medical Corps in the Philippines. When Ed's military service was complete, Sally and Ed lived in St. Louis and New York before returning to Omaha.

The first two kidney transplants in Nebraska were conducted by Dr. Malashock in 1965. He then joined the UNMC faculty as a clinical professor of urologic surgery. Dr. Malashock served as President of Clarkson Hospital Medical Staff, Metropolitan Omaha Medical Society and the Nebraska Urological Society. He was the president of the Douglas County Medical Society, and served on the boards of Jewish Family Service, the Jewish Federation of Omaha, and Temple Israel.

The Jewish Federation of Omaha Foundation is extremely thankful to both Sally and Ed Malashock for their generosity to the Omaha community, and extend our deepest condolences to the Malashock family.



Edward and Sally Malashock

OJAA GROWING STRONGER EACH AND EVERY YEAR #STILLHOMAHA

This year was another interesting year as the pandemic continues; however, it sure was a fun one. This year we kept cranking out OJAA monthly newsletters (which I hope everyone enjoys), while adding weekly Shabbat posts on our ever-growing Facebook and Instagram pages. Unfortunately, we were unable to host an out-of-town event this year, and we are really hoping to do so in 2023. If you want to bring OJAA to your city, please give me a call, or send me an email. Yes, I have a phone too, and I enjoy speaking with every member that calls to talk with me!

This year we added some board members, and said goodbye to some original members. Thank you to Patty Nogg, Sarah Spooner, Jody Malashock, and Howard Epstein for being on the board from the beginning. We wish you the best in your future endeavors. We would like to welcome our new members to the board. There are many who are unaware that I'm not a one-person operation, and I would like to share the spotlight on the individuals who make the Omaha Jewish Alumni Association special. A special thanks to Gary Epstein, Lisa Epstein, Asher Stoller, Rachel Ring, Jessica Cohn, Mushka Tenenbaum, Bob Rifkin, Amy Shivvers, Brian Nogg, Gary Javitch, Stephanie Cohen, Amy Dworin, and Danielle Gordman. Some are seasoned members, and some are about to sit in on their first or second meeting, and that is what makes our board so great! I thank each and every one of you for your ideas and support. This year we hosted a virtual trivia night, and even though it was a blast, we clearly saw that people wanted off of Zoom and the ability to get back to face-to-face gatherings when possible. We also continued what we can now call a tradition in



Howard Epstein, Linda Pollard,
Jay Katelman, Laurie Peatrowsky,
Diane Walker, and Amy Shivvers



Back Row - Gary & Lisa Epstein
Front Row - Larry Kelberg &
Stephanie Cohen

holding our second OJAA Charity Topgolf Outing to benefit the Pennie Z. Davis Early Learning Center. This year was even more successful than the year before. The Omaha Jewish Alumni Association is excited to announce that we raised \$8,000 this year for ELC scholarships! We had many unbelievable sponsors, and a record 113 people registered for the event. Put it on your calendar for next August. We are so thankful and excited for a successful 2023.

LIFE & LEGACY™ PROGRAM COORDINATOR REPORT 2022

After more than 8 years, LIFE & LEGACY is being re-invigorated, and one of the reasons for that is the program needs a jump start. A jump start is just what it will receive. On January 1st, 2023, we will start a program called LIFE & LEGACY PLUS. This is the start of a 4-year program where the Jewish Federation of Omaha Foundation will reward our nine partner organizations for their hard work by continuing to recruit and formalize commitments. It should be a fun year full of new challenges and a lot of new excitement. As we currently sit, the Omaha Jewish community LIFE & LEGACY program has received 679 signed commitments with an estimated value of \$25,402,792. The increase in estimated dollars this past year would not be possible without the tireless efforts of our ten partner organizations, lay leaders, and generous volunteers. The partner organizations are the Institute for Holocaust Education, Nebraska Jewish Historical Society, Chabad House, Friedel Jewish Academy, Temple Israel, Beth El Synagogue, Beth Israel Synagogue, B'nai Israel Synagogue, and the Jewish Federation of Omaha and its agencies. Additionally, we wish to recognize the vision, leadership, and support of our JFOF board and generous donors.

We look forward to what Year 9 has to bring. On a personal note, I am very much looking forward to helping both our partner organizations and individuals flourish during year 1 of LIFE & LEGACY PLUS. For more information, or to learn more about LIFE & LEGACY, please contact me at (402) 334-6461, or at jkatelman@jewishomaha.org. LIFE & LEGACY is a fantastic way to honor your favorite Omaha area Jewish organizations!



Stay well,

Jay Katelman
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:



And its Agencies:

Jewish Community Center
Jewish Community Relations Council
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 Abraham
Michael & Sheri Abramson
Michael Albert*
Anonymous (40)
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
Bruce H. Brodkey & Marcia A. Hoffman
Ron Brodkey*
Miriam Brooks
Carrie & Josh Brown
Elliot Brown*
Beth Cohen
David & Karla Cohen
Marla & Bob Cohen
Drs. Michael & Karen Cohen & Family
Daniel Cohn
Pam Cohn
Justin Cooper
Ronald & Cheryl Cooper
Mickey & Fran Coren
Jerry* & Janey Dann
Hal & Mary Daub
Arthur L. Davidson*
Betsy G. Davidson
Larry & Hanna DeBruin
Rabbi Ari Dembitzer
Deborah Denenberg
Norman & Eunice* Denenberg
Steven Denenberg

Tippi Denenberg
JohnCarl Denkovich
Pam & Dennis DePorte
Beth Seldin Dotan
Eric Dunning
Toba Cohen-Dunning
Penny Krasne Endelman
Alex Epstein
Harold Epstein*
Howard & Sharon Epstein
Irving Epstein
Lindsay Epstein
Lisa & Gary Epstein
Mel Epstein
Paul & Sandy Epstein
Dr. Steven R. Epstein
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
Steven M. Friedman
Lynne Friedel Gellman
Howard E. Gendelman
H. Lee & Carol Gendler Charitable Fund
Donald Gerber
Dan & Sarah Gilbert
David Gilinsky & Katherine Finnegan
Ronald Giller

Darlene & Sherman* Golbitz
Andi Goldstein
Donald E. Goldstein
Gary & Barbara Goldstein
Jan Goldstein
Kathy Goldstein
Dora Goldstrom
Mark Goldstrom
Alan Goodman*
David & Shirley Goodman
Andie Gordman & Dan Fitzgerald
Jay & Allison Gordman
Kip & Bridget Gordman
Linda & Jerry* Gordman
Steven Gottlieb
Andy & Carole Greenberg
Barton H.* & Caryl B.* Greenberg
Paul G. Greenberg *(in loving memory of*
Yvonne, Walter & Brant Greenberg)
Bennett & Robin Greenspan
Joshua & Amanda Gurock
Mace Hack
Mendy & Michael Halsted
Andrea & Marc Hamburg
M'Lee Hasslinger
Bonnie Kuklin Horwich
Jon Jabenis
Randi Friedel Jablin
Joan Sandler Jacobson
Richard Jacobson
Gary & Karen Javitch
Patrick Jensen
Sylvia Jess*
Edward & Anne Joseph & Family
Debbi Josephson
Frances Juro
Richard Juro
Becky Kahn
Marcel & Ilse* Kahn
Mr. & Mrs. Stephen Kaniewski
Gary* & Sally Kaplan

Myron Kaplan
Russ Kaplan
Beatrice Karp*
Gloria C. Kaslow
Howard J. Kaslow
Cookie Katskee
Julee Katzman
Les & Helen Kay
Jeff & Sharon Kirshenbaum
Joe Kirshenbaum*
Kevee Kirshenbaum*
Donald S.* & Delores Klein
Marsha A. Kleinberg
Milton M. Kleinberg
Sara & Ari Kohen
David Kohl
Janet Kohl
Howard M. & Sharon Kooper
Shane & David Kotok
Jack Kozlen
Alan & Deborah Kricsfeld
Janie Fox Kulakofsky
David & Debi Kutler
Howard & Nancy Kutler
Stuart & Sandy Kutler
Carole A. Lainof
K. Wayne & Carole A. Lainof
Randal Langdon
Sharon Comisar-Langdon
Barbara Lashinsky
Joanie Lehr
Sandy & John Lehr
Susan Lehr
Mike & Bobbi Leibowitz
Paula A. Lenz
Vincent P. Lenz
Steve & Bonnie Levinger
Rochelle Lewis
David Lieberman
Felicia & Scott Littky
Mario Lopez



Steve* & Thelma* Lustgarten
Trenton B. Magid
Diane* & Larry Malashock
Dr. Edward* & Sally* Malashock
Jody & Neal Malashock
Stanley* & Barbara* Malashock
 Chaya Sarah Malkah
Dan Marburg
Joan Krasne Marcus
 Lisa Marcus
Julie & Mark Martin
Bruce Meyers
Jon & Denise Meyers
Sue Meyers*
Tina & Joe Meyers
Robert Y. Meyerson, M.D.
Troy & Jamie Meyerson
Dr. Sidney Mirvish*
Stanley & Evelyn Mitchell
Eli & Ann* Modenstein
Ann Moskovits*
John Mosow & Ellin Siegel
Janie & Allan Murow
Mary-Beth & Bruce Muskin
Michael Muskin
 Amy Nachman
Gary Nachman
Allison Newfeld
Murray & Sharee Newman
Dr. Patricia Newman
Phyllis & E. R. "Bob" Newman
 Allan S. Noddle
Patty Nogg
Steve Nogg
Susan R. Norton
Andrea Olson
Alan S. Parsow
Carol S. Parsow
Margo Frohman Parsow
Robert* & Betty Perelman
Vicki Perlmeter

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

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

Basya Tsed
R. Thomas Vann
Irving & Gail Veitzer
Norman & Joodi* Veitzer
John & Donna Walter
Jim & Esther* Wax
Steve & Joye Wees
Aaron Weiner & Therese Vaughn
Harry M. Weiner
Kathy Weiner
 Rabbi Yaakov & Ilana Weiss
Benjamin & Anna* Wiesman Family
 Susan Fellman Witkowski
Nancy L. Wolf
Robert Yaffe
 Anna Yuz-Mosenkis
Jeff Zacharia
Renee Zacharia
Steve & Kathy Zalkin
Charlotte* & Morley* Zipursky
Sally & Jim Zipursky
Deborah & Speedy (Dr. Eugene) Zweiback
Rosie Zweiback & Mace Hack

*Of Blessed Memory

Names as of November 29, 2022

Bolded - This means individual(s) have indicated to the Foundation they have formalized their commitment legally. If you have formalized, and are not bolded please contact Jay Katelman at jkatelman@jewishomaha.org or at 402.334.6461 to correct.

This is the year to establish your Legacy.

Contact the Jewish Federation of Omaha Foundation today!

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IN MEMORY OF ALAN J. LEVINE

Alan Levine, an Omaha native, but long-time California resident passed away on March 18, 2022, and was laid to rest in Omaha at Temple Israel Cemetery. Alan loved attending Central High School, stating, “There were so many Jewish students and we all knew each other. There were countless ways to come together and reasons to connect.” Even though he made California his residence for over 60 years, Alan still felt a strong connection to his boyhood home, and knew that he wanted to leave a legacy to the Omaha community.

Alan left a multimillion-dollar gift to the Jewish Federation of Omaha Foundation. The Alan J. Levine Building Fund was established with Alan’s generous gift. This fund will support buildings and associated improvements located, or to be located, on or near the campus of the Jewish Federation of Omaha. These buildings are to be used primarily as assisted living facilities, residential or daycare facilities for Alzheimer’s patients or any other facilities which primarily serve elderly Jewish citizens.

The Alan J. Levine Program Fund was also created with Alan’s gift. This endowment provides funding for programs that give companionship or support for financially needy or isolated elderly Omaha Jewish residents. It is also intended to enhance Omaha Jewish residents’ understanding and appreciation for Jewish holidays and traditions or to stimulate interaction among the adult Jewish community.

Alan also wanted to give something to the Omaha Jewish community that would bring people together and make them happy. He funded the new Alan J. Levine Performing Arts Theater, the new state-of-the-art performance center at the Jewish Community Center back in 2018.

Alan’s generosity has benefited both the Jewish community and the greater Omaha community with the Alan J. Levine Building Fund, the Alan J. Levine Program Fund, and the Alan J. Levine Performing Arts Theater. We are fortunate that a hometown boy so lovingly remembered his years growing up in the Omaha Jewish community.



Alan Levine



Alan J. Levine Performing Arts Theater



ALAN J. LEVINE

Performing Arts Theater



BALANCE SHEET - JUNE 30, 2022

ASSETS

	06/30/21 <u>Beginning</u>		06/30/22 <u>Ending</u>		<u>Change</u>
Chicago Pooled Endowment Portfolio	\$34,092,952	28.25%	\$29,943,727	26.52%	(\$4,149,225)
Vanguard Wellington Admiral Fund	24,755,274	20.51%	25,289,009	22.39%	533,735
Vanguard Life Strat. Conservative Growth Fund	23,973,894	19.85%	25,241,613	22.35%	1,267,719
Vanguard Life Strat. Moderate Growth Fund	25,016,155	20.73%	24,733,542	21.90%	(282,613)
Common Stocks	2,511,606	2.08%	2,453,700	2.17%	(57,906)
Short-term Investments	2,968,575	2.46%	2,438,326	2.16%	(530,249)
Alternative Investments	3,151,661	2.61%	1,600,156	1.41%	(1,551,505)
Israel Bonds	1,000,000	0.83%	962,495	0.84%	(37,505)
RBJH Capital Project and JFO Receivable	476,745	0.40%	299,646	0.26%	(177,099)
Corporate Bonds	40,000	0.03%	0	0.00%	(40,000)
U.S. Government Securities	325	0.00%	0	0.00%	(325)
Boston Jewish Community Endowment Pool	<u>2,712,421</u>	<u>2.25%</u>	<u>0</u>	<u>0.00%</u>	<u>(2,712,421)</u>
Managed Assets	\$120,699,608	<u>100.00%</u>	\$112,962,214	<u>100.00%</u>	(\$7,737,394)
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	3,411,750		3,123,721		(288,029)
Funds Held and Invested for Benefit of Federation or Its Agencies:					
Jewish Federation Reserve Funds	(3,328,196)		(3,867,117)		(538,922)
Custodial Funds	<u>(13,270,864)</u>		<u>(10,384,529)</u>		<u>2,886,336</u>
Total Assets	<u>\$107,512,298</u>		<u>\$101,834,289</u>		<u>(\$5,678,009)</u>

FUND BALANCES

Restricted or Designated Endowments	\$64,789,502	60.26%	\$64,336,883	63.18%	(452,618)
Donor-Advised Funds	32,754,963	30.47%	27,911,066	27.41%	(4,843,897)
Unrestricted Endowments	6,368,859	5.93%	6,297,098	6.18%	(71,762)
Supporting Foundation (Pardes Foundation)	187,224	0.17%	165,521	0.16%	(21,704)
Charitable Remainder Trusts and Life Insurance (Under Separate Management)	<u>3,411,750</u>	<u>3.17%</u>	<u>3,123,721</u>	<u>3.07%</u>	<u>(288,028)</u>
Total Fund Balances	<u>\$107,512,298</u>	<u>100.00%</u>	<u>\$101,834,289</u>	<u>100.00%</u>	<u>(\$5,678,009)</u>



Statement of Support, Revenue, Allocations and Expenses July 1, 2021 - June 30, 2022

Beginning Fund Balances - 07-01-21	<u>\$107,512,298</u>
Lifetime Gifts and Contributions	13,204,944
Investment Income	(11,972,177)
Grants and Allocations	(6,224,897)
Beneficiary Income Payments	(133,811)
Foundation Office Expense	<u>(552,068)</u>
Net Change in Fund Balances	<u>(5,678,009)</u>
Ending Fund Balances - 06-30-22	<u>\$101,834,289</u>

Jewish Federation of Omaha Foundation Financial Highlights as of June 30, 2022

A - Summary of fiscal year activity for all funds*

Current value of funds	\$112,962,214
Current number of funds	683
Current number of donor-advised funds	140
Current number of Young Jewish Giving funds	118
Current number of endowment funds	425
Number of new funds in 2020-2021 (includes 2 new Young Jewish Giving funds)	27

Change in funds from June 30, 2021 to present:

New contributions	\$13,204,944
Investment performance	(11,972,177)
Grants & Distributions	(6,224,897)
Other	<u>(685,879)</u>
Total	<u>(\$5,678,009)</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 2022	\$108.4
1 Year Ago	June 2021	109.1
3 Years Ago	June 2019	88.0
5 Years Ago	June 2017	72.2
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Total Investment Return - 1 Year		(10.52%)
Total Investment Return - 3 Years		4.10%
Total Investment Return - 5 Years		4.58%

**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.



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.



Jay Katelman, Diane Walker, Amy Bernstein Shivvers, Linda Pollard and Laurie Peatrowsky

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) 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 2022 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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Harley D. Schrager

Thank You

Harley, we thank you for 31 years of commitment on the Foundation Board, serving from 1991-2022 and presiding from 1996-1998. The groundwork you have laid has allowed the Foundation to prosper each and every year! You will be missed and we wish you the best.