EXEMPLARY WOMEN
Endowing the Future

2019 ANNUAL REPORT
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.
Dear Community Members:

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

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

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

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

Regards,

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

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

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

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

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

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

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

With sincere thanks,

Howard Epstein
Executive Director
Bea was born in Lauterbach, Germany in 1932. When she was just 8, Bea and her family were sent to concentration camps in Southern France. Bea and her younger sister were saved by the French Jewish Underground (the OSE), and hidden in nearly 15 different homes and a convent before the war’s end. Their parents were murdered in Auschwitz. Bea came to NY in 1947 and later settled with her family in Omaha.
Bea Karp left an enormous impact on the lives of those who were privileged enough to know her or hear her speak. Through her work with the Institute for Holocaust Education and her book, *My Broken Doll*, Bea touched the hearts and lives of thousands of people. She tirelessly gave so much of herself to Omaha and to the Omaha Jewish community – her time, her energy, her personal story.

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

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

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

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

“‘Poor me’ was not in her vocabulary. Mom was a survivor with great strength to carry on despite all of life’s challenges,” noted Deborah. With Bea’s generous gifts, the organizations that she endowed will be able to meet their challenges much more easily, and continue the work that meant so much to Bea.
The Jewish Federation of Omaha has been partnering with MOMentum since 2016. The Jewish Federation of Omaha Foundation has helped fund these amazing trips to Israel for 48 Omaha Jewish mothers.

MOMentum is a global movement focused on the greatest influencer -- the Jewish mother. Dedicated to inspiring Jewish mothers to live their most meaningful lives, MOMentum offers empowering journeys, revitalizing events, and a robust multimedia platform. MOMentum is where Jewish comes to life.
Funds providing income for the annual budget of the Jewish Federation of Omaha and its Agencies

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

JEWISH SOCIAL SERVICES

JEWISH FAMILY SERVICE
- Beatrice Karp LIFE & LEGACY Fund for Jewish Family Service
- Jewish Family Service Campaign Legacy Fund
- Jewish Family Service Endowment

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

ROSE BLUMKIN JEWISH HOME
- Sylvan Block Endowment
- Rose Blumkin Jewish Home Endowment
- Loyal B. and Lorene Cohn Endowment
- Hazel Degen Bequest Fund
- Max and Betty Falk Rose Blumkin Jewish Home Endowment
- Isadore H. and Rose K. Weiner Trust Fund
- Eli M. and Sara Zalkin Endowment
Funds providing income for designated purposes of the Jewish Federation of Omaha and its Agencies

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

JEWS COMMUNITY CENTER

B’NAI B’RITH YOUTH ORGANIZATION
• Dr. Abe Greenberg/B’nai B’rith/Henry Monsky Lodge Endowment
• B’nai B’rith Youth Organization Program Resource Fund
• Omaha B’nai B’rith Youth Organization Endowment

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

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

JEWS 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 Jewish Senior Outreach Fund
• 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. Epstein 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 Sayenberg 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 Wintrob Sing-A-Long Fund
- Sara Rose Woskoff Arts and Crafts Resource Fund
- Religious Programming Fund

JEWISH FAMILY SERVICE

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

JEWS FEDERATION KIRPE 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. Abrams Endowment
- Sandra Belgrade Memorial Professional Development Endowment
- Ruth Frisch and Oscar S. Belzer Endowment
- Dr. Bernard H. Bloom and Dr. Bruce S. Bloom Memorial Endowment
- Bruce Fellman Memorial Young Leadership Award Endowment
- JFO Friedland Steiner Boggust Endowment
- Glazer Family Charitable Fund
- Arthur H. and Ruth M. Goldstein Family Endowment
- Paul and Edith Goldstein Family Endowment
- Robert and Ellen Gordman Jewish Teen Leadership Fund
- Philip M. and Ethel Kluznick Program for Studies in Jewish Civilization Fund
- Aaron H. and Ruth Somberg Krantz Fund
- Sadie and Harry Kulakofsky Memorial Fund
- Ayv 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 Tamoff Friedman College Scholarship Endowment
- Rebecca Friedman Scholarship Fund
- Carl L. Frohm Educational Custodial Fund
- Marvin Gilman Scholarship Fund
- Ann Goldstein Education Programming Endowment Fund
- Gary and Barbara Goldstein Jewish Youth Camp Fund
- Leonard and Shirley Goldstein Family Endowment
- Herbert Goldstein 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
- Ahava Dan Jewish Community Engagement Fund
- CornerStones Fund
- Passport to Israel Program Fund
ESTABLISHED FUNDS DESIGNATED FOR THE JEWISH FEDERATION ANNUAL CAMPAIGN

- Norman B. and Frances P. Batt PACE Fund
- Sandra Belgrade LOJE Fund
- Herbert M. Berkowitz Memorial PACE Fund
- Dr. Mark Brodkey PACE Fund
- Leo and Aileen Eisenstat 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
- Betty 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 Joozi Veitzer Fund

JEWISH FEDERATION OF OMAHA FOUNDATION

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

LIFE & LEGACY FUNDS
Providing income for the various nine partners (see pages 21-23 for more information)

- Sandra Belgrade LIFE & LEGACY Endowment
- Arthur and Betsy Davidson LIFE & LEGACY Endowment
- Gary and Barbara Goldstein LIFE & LEGACY Endowment
- Steve and Thelma Lustgarten Endowment
- Jody and Neal Malashock Endowment
- Bruce Meyers LIFE & LEGACY Endowment
- Robert and Betty Perelman Endowment for the Federation
- Vicki Perimeter 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 Kuly Newman Memorial Fund
- Esther K. Newman Memorial Fund
- Murray H. and Sharee C. Newman Supporting Foundation

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

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. Kuly Endowment
- Louis S. Kuly and Debra J. Kuly Endowment for Mt. Sinai Cemetery in Hastings, NE
- Livingston Plaza Custodial Fund
- Yale Richards Memorial Endowment
- Vivian and Morton Schwarz College Scholarship Fund
- Sigma Alpha Mu University of Nebraska Scholarship Fund

• 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
SUPPORT FOR PARTNERS / AFFILIATES / OTHER ORGANIZATIONS

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

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

BETH ISRAEL SYNAGOGUE
- Jake and Susan Besser Israel Experience Endowment
- The Hillel Fund

B’NAI B’RITH/HENRY MONSKY LODGE
- Adam Jacobs Memorial Tribute Scholarship Fund
- B’nai B’rith Edward Zorinsky Fund

B’NAI ISRAEL SYNAGOGUE (Council Bluffs, IA)
- Goldstein Family Endowment for B’nai Israel Synagogue

CHABAD LUBAVITCH OF NEBRASKA
- Ann Cohen Memorial Chabad Education Fund
- Goldstein Family Endowment for Chabad Lubavitch of Nebraska
- Forrest Nathan and Lisa Stewart Krutte Endowment
- Chabad Second Rabbi’s Endowment
- Chabad LIFE & LEGACY Endowment

FRIEDEL JEWISH ACADEMY
- Nathan and Rose Lillian Fine Endowed Teacher of the Friedel Jewish Academy
- Leonard L. and Phyllis J. Friedel Family Endowment

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 Ossoff 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. Hechtmann and Martin M. Staenberg Family NJHS Oral History Project Endowment
- NJHS ~ 5th Commandment Sustaining Fund
- Nebraska Jewish Historical Society Custodial Fund
- Nebraska Jewish Historical Society LIFE & LEGACY Endowment

TEMPLE ISRAEL
- Temple Israel LIFE & LEGACY Endowment

INSTITUTE FOR HOLOCAUST EDUCATION
- Beatrice Karp LIFE & LEGACY Fund for IHE
- Paula and Vince Lenz Endowment for IHE
- Institute for Holocaust Education LIFE & LEGACY Endowment

GIFTS THAT MATURE IN THE FUTURE

Charitable Remainder Trusts:
- Morton A. Ives
- Ruth E. Raskin
- Murray H. Newman
- Jeanne Lipsey Rosenblum

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

Sandra Belgrade
Sandra Belgrade LIFE & LEGACY Endowment
Sandra Belgrade LOJE Fund
Sandra Belgrade Memorial Professional Development Endowment
Irvin J. Harris
Harris Family Endowment
Ilse Kahn
Marcel & Ilse Kahn Endowment for the Jewish Federation of Omaha
Marcel & Ilse Kahn PACE Fund
Bea Karp
Beatrice Karp LIFE & LEGACY Fund for the ADL/CRC
Beatrice Karp LIFE & LEGACY Fund for Beth El Synagogue
Beatrice Karp LIFE & LEGACY Fund for the IHE
Beatrice Karp LIFE & LEGACY Fund for JFS
Sally Malashock
Ed & Sally Malashock Jewish Senior Outreach Fund
Stanley Perlmeter
Janet S. & Stanley E. Perlmeter Memorial Courtyard Maintenance Fund
Perlmeter Family Jewish Family Service Assistance Fund
Rosalie Saylan
Craig Saylan Memorial Endowment
Rosalie & Milton Saylan Endowment for JFS
Rosalie & Milton Saylan Endowment
Rosalie & Milton Saylan NJHS Endowment
Harriet Singer
Lazier L. & Harriet B. Singer Memorial Fund for Youth
Sherman Sperling
Charitable Gift Annuity for Blumkin Home Capital Project
Anna Wiesman
Anna E. & Benjamin Wiesman Endowment
Anna E. & Benjamin Wiesman Endowment for the Jewish Press
Sandra Belgrade
Beatrice Karp
Ilse Kahn
Ron Brodkey
Sally Malashock
Rosalie Saylan
Beatrice Karp
Anna Wiesman
Harriet Singer
Charlotte Zipursky

ENDOWMENT & CUSTODIAL FUNDS
LION OF JUDAH ENDOWMENT

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

LOJE Donors:

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

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

*Of blessed memory
## Balance Sheet - June 30, 2019

### ASSETS

<table>
<thead>
<tr>
<th>Asset Description</th>
<th>06/30/18</th>
<th>%</th>
<th>06/30/19</th>
<th>%</th>
<th>Change</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chicago Pooled Endowment Portfolio</td>
<td>$26,538,916</td>
<td>27.94%</td>
<td>$28,232,362</td>
<td>28.92%</td>
<td>$1,693,446</td>
<td>5.81%</td>
</tr>
<tr>
<td>Boston Jewish Community Endowment Pool</td>
<td>$26,902,295</td>
<td>28.32%</td>
<td>$27,732,630</td>
<td>28.41%</td>
<td>$830,335</td>
<td>3.09%</td>
</tr>
<tr>
<td>Vanguard Life Strat. Conservative Growth Fund</td>
<td>$13,262,870</td>
<td>13.96%</td>
<td>$14,329,847</td>
<td>14.68%</td>
<td>$1,066,977</td>
<td>7.99%</td>
</tr>
<tr>
<td>Vanguard Life Strat. Moderate Growth Fund</td>
<td>$13,217,043</td>
<td>13.91%</td>
<td>$14,225,688</td>
<td>14.57%</td>
<td>$1,008,645</td>
<td>7.67%</td>
</tr>
<tr>
<td>Common Stocks</td>
<td>$3,576,228</td>
<td>3.76%</td>
<td>$3,052,864</td>
<td>3.13%</td>
<td>$(523,364)</td>
<td>(14.65)%</td>
</tr>
<tr>
<td>Short-term Investments</td>
<td>$3,518,670</td>
<td>3.70%</td>
<td>$2,955,959</td>
<td>2.66%</td>
<td>$(562,711)</td>
<td>(16.01)%</td>
</tr>
<tr>
<td>Corporate Bonds</td>
<td>$2,882,597</td>
<td>3.03%</td>
<td>$2,940,027</td>
<td>3.01%</td>
<td>$(57,430)</td>
<td>(2.01)%</td>
</tr>
<tr>
<td>Alternative Investments</td>
<td>$2,665,872</td>
<td>2.81%</td>
<td>$2,688,133</td>
<td>2.75%</td>
<td>$(22,261)</td>
<td>(0.84)%</td>
</tr>
<tr>
<td>RBJH Capital Project and JFO Receivable</td>
<td>$1,432,045</td>
<td>1.51%</td>
<td>$805,892</td>
<td>0.83%</td>
<td>$(626,153)</td>
<td>(43.23)%</td>
</tr>
<tr>
<td>Israel Bonds</td>
<td>$989,023</td>
<td>1.04%</td>
<td>$1,000,000</td>
<td>1.02%</td>
<td>$(10,977)</td>
<td>(1.10)%</td>
</tr>
<tr>
<td>U.S. Government Securities</td>
<td>$4,088</td>
<td>0.00%</td>
<td>$2,371</td>
<td>0.00%</td>
<td>$(1,717)</td>
<td>(41.67)%</td>
</tr>
</tbody>
</table>

**Managed Assets**

- Charitable Remainder Trusts and Life Insurance (Under Separate Management) | $2,499,529 | 2.95% | $2,715,129 | 3.17% | $215,600 | 8.57% |

**Funds Held and Invested for Benefit of Federation or Its Agencies:**
- Jewish Federation Reserve Funds | $(1,909,497) | (2.22)% | $(3,368,387) | (3.58)% | $(1,458,890) | (77.25)% |
- Custodial Funds | $(10,954,719) | (12.32)% | $(11,169,359) | (12.52)% | $(214,640) | (1.97)% |

**Total Assets** | $84,624,961 | 100.00% | $85,782,789 | 100.00% | $1,157,829 | 1.37% |

### FUND BALANCES

<table>
<thead>
<tr>
<th>Fund Description</th>
<th>06/30/18</th>
<th>%</th>
<th>06/30/19</th>
<th>%</th>
<th>Change</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restricted or Designated Endowments</td>
<td>$51,010,117</td>
<td>60.28%</td>
<td>$51,129,763</td>
<td>59.60%</td>
<td>$119,646</td>
<td>0.29%</td>
</tr>
<tr>
<td>Donor-Advised Funds</td>
<td>$25,671,853</td>
<td>30.34%</td>
<td>$27,049,910</td>
<td>31.53%</td>
<td>$1,378,057</td>
<td>5.38%</td>
</tr>
<tr>
<td>Unrestricted Endowments</td>
<td>$5,284,768</td>
<td>6.24%</td>
<td>$4,738,790</td>
<td>5.52%</td>
<td>$(545,978)</td>
<td>(10.33)%</td>
</tr>
<tr>
<td>Supporting Foundation (Pardes Foundation)</td>
<td>$158,694</td>
<td>0.19%</td>
<td>$149,197</td>
<td>0.17%</td>
<td>$(9,497)</td>
<td>(5.96)%</td>
</tr>
<tr>
<td>Charitable Remainder Trusts and Life Insurance (Under Separate Management)</td>
<td>$2,499,529</td>
<td>2.95%</td>
<td>$2,715,129</td>
<td>3.17%</td>
<td>$215,600</td>
<td>8.57%</td>
</tr>
</tbody>
</table>

**Total Fund Balances** | $84,624,961 | 100.00% | $85,782,789 | 100.00% | $1,157,829 | 1.37% |
Statement of Support, Revenue, Allocations and Expenses
July 1, 2018 - June 30, 2019

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

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

A - Summary of fiscal year activity for all funds*

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current value of funds</td>
<td>$97,605,407</td>
</tr>
<tr>
<td>Current number of funds</td>
<td>615</td>
</tr>
<tr>
<td>Current number of donor-advised funds</td>
<td>139</td>
</tr>
<tr>
<td>Current number of Young Jewish Giving funds</td>
<td>127</td>
</tr>
<tr>
<td>Current number of endowment funds</td>
<td>349</td>
</tr>
<tr>
<td>Number of new funds in 2018-2019</td>
<td>46</td>
</tr>
</tbody>
</table>

(includes 14 new Young Jewish Giving funds)

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in funds from June 30, 2018 to present:</td>
<td></td>
</tr>
<tr>
<td>New contributions</td>
<td>$5,747,484</td>
</tr>
<tr>
<td>Investment performance</td>
<td>3,902,663</td>
</tr>
<tr>
<td>Grants &amp; Distributions</td>
<td>(7,847,821)</td>
</tr>
<tr>
<td>Other</td>
<td>(644,498)</td>
</tr>
<tr>
<td>Total</td>
<td>$1,157,828</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Description</th>
<th>June 2019</th>
<th>June 2018</th>
<th>June 2016</th>
<th>June 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>$88.0</td>
<td>83.6</td>
<td>65.7</td>
<td>69.1</td>
</tr>
<tr>
<td>1 Year Ago</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Years Ago</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Years Ago</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Total Investment Return - 1 Year    | 4.45%     |
| Total Investment Return - 3 Years   | 6.65%     |
| Total Investment Return - 5 Years   | 3.48%     |

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

**Total Distributions from Endowment Funds & Supporting Foundations**

$2,309,000

- **44%** Jewish Social Services (RBJH/JSO/JFS) $1,015,000
- **19%** JFO Annual Campaign & Operating Income 440,000
- **9%** Scholarships 215,000
- **8%** Sokolof Scholarships, Awards & Programs 174,000
- **7%** JCC Programs & Building Improvements 158,000
- **5%** JFO Agency Programming 114,000
- **3%** Foundation Programs 77,000
- **3%** Local Jewish Organizations 71,000
- **2%** Outside Organizations 45,000
Ilse Kahn

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

The Kahns visited the Hessels after Marcel’s college graduation in 1954. Ilse and Marcel had last seen each other in Germany when they were four and six, respectively. The visit gave Ilse and Marcel a chance to get reacquainted, and Marcel was taken with the pretty young woman. Marcel served in the Air Force for two years after college graduation, and was stationed in Georgia. He had the opportunity to fly on military business between Georgia and New York frequently, and dated Ilse whenever he was in New York. Ilse delightfully surprised Marcel with a “yes” when he proposed marriage, and the Kahns were married in 1956. They lived in Georgia for half a year before settling in Omaha.

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

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

Ilse kept busy as the mother of two sons, a business woman, and she was always deeply involved with activities at Beth El Synagogue. A modest woman, Ilse believed in giving to charities quietly and generously. The Omaha Jewish community has already gained so much from Ilse and Marcel’s quiet philanthropy, and will continue to benefit for many generations to come.
The Kahns visited the Hessels after Marcel’s college graduation in 1954. Ilse and Marcel had last seen each other in Germany when they were four and six, respectively.
To honor and perpetuate the memory of her husband of 49 years, Harriet Singer, of blessed memory, established the Lazier L. Singer Memorial Fund for Youth in November of 1996. In May 2019, after Harriet's death, her children, Sandy Kutler and Mark Singer, chose to pay tribute to their mother by adding her name to the fund, and it is now known as the Lazier L. and Harriet B. Singer Memorial Fund for Youth.

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

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

Speaking of her mother, Sandy said, “She felt like she had a great life and family and was supported by the Omaha Jewish community and wanted to give back.” And with thoughtful planning, Harriet did just that.
Sandra Belgrade, of blessed memory, was a first generation American who loved her family and her Jewish community. Sandra’s son, Bob, remembers how his mother enjoyed hosting the family and preparing holiday meals using old Jewish recipes. She showed her love of our Jewish community by her thoughtful planning in establishing endowment funds to continue her legacy of giving.

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

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

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

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

Due to Sandra’s philanthropic planning, the entire Omaha Jewish community will benefit from her generosity. Sandra planned ahead and planned well, giving to the organizations that were close to her heart. Her gifts will impact many lives today and far into the future.
Sherman Sperling was born in Sioux City, Iowa, and moved to Council Bluffs after serving in the Army Air Corp in World War II. He and his wife, Harriett, moved to Omaha in 1963. Sherman operated Mid West Auto Supply Company, and after his retirement he started a sign painting company. In 2003, Sherman and Harriett moved to California to be close to their daughter Kathy and her family. The Sperlings were very active at Temple Israel while living in Omaha, and remained active in California at Temple Judea. Harriett Sperling passed away in 2011.

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

Exemplary Women

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

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

Sally Malashock
Rosalie Saylan
Anna Wiesman

In Memoriam
**In Memoriam**

**Lt. Colonel Irvin Harris**

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

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

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

**Stanley Perlmeter**

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

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

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

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

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

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

www.facebook.com/OmahaJewishALumni

The Omaha Jewish Alumni Association (OJAA) was created to establish and secure the future of Omaha’s Jewish community by connecting Jewish individuals who are currently living in Omaha with all Jewish individuals who formerly lived in Omaha and now live elsewhere.

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

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

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

Very sincerely yours,

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

Welcome to Jewish Omaha’s Legacy Society!
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

Names as of December 20, 2019
*Of Blessed Memory
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.
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!
Thank You

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