



# Jewish Endowment Foundation of Louisiana

Annual Report 2013

You shall place these words on your hearts and on your souls ...



... you shall teach them to your children to speak about them  
when you dwell in your house, when you travel on the road, when  
you lie down, and when you arise.

The mezuzahs featured in this report are from the collection of Meryl and the late Alan Rosenbloom. Alan Rosenbloom was fascinated by mezuzahs. He was intrigued by the individual expression and unique design created by each artist. So began Alan's passion for collecting mezuzahs from the different countries of the Diaspora. It was always an enjoyable quest, as each mezuzah came with a story. Over the years, the Rosenblooms' collection grew to 70 pieces.

We are grateful to Meryl Rosenbloom for sharing some of this remarkable collection with us.

**"If there be any truer measure of a man than by what he does, it must be by what he gives."**

**– Bishop Robert South**

# Message from Our President and The Year in Review 2013

Dear Friends,

It is with great pleasure that the Jewish Endowment Foundation of Louisiana presents our 2013 Annual Report. We want to thank those of you who have partnered with JEF on your philanthropy. If you have not given to JEF before, please consider doing



so. This is a perfect time to begin a relationship as we mark 46 years of helping secure our Jewish community. Please allow us to assist you in meeting your charitable objectives and help you reap the benefits of tax-wise planned giving while providing for present and future generations.

In this time of low interest rates, I would like to let you know about an opportunity to receive higher returns by opening a charitable gift annuity (CGA) at JEF. For example, the current rate for a 65-year-old is

4.7% and for a 75-year-old, it is 5.8%. By purchasing a CGA, you get an immediate tax deduction as well as guaranteed lifetime income with part of the income tax-free. We can prepare a personal proposal for any amount over \$5,000.

To learn more about this and other charitable giving opportunities at JEF, please call Executive Director Sandy Levy at 504-524-4559. As the year draws to a close and you reflect on your blessings, this is the perfect time to share your good fortune by creating a legacy with JEF.

With best wishes for a happy and healthy 2014, I remain,

Sincerely yours,



Carol B. Wise,  
President

For the past 46 years, the Jewish Endowment Foundation of Louisiana has continuously served our Jewish community by assisting donors from all walks of life in carrying out their charitable goals. Our foundation, which originally started in Greater New Orleans, now includes Baton Rouge, Monroe, and the entire state of Louisiana. We are the Louisiana Jewish community's address for planned giving.

Serving present needs and securing funds for the future is our most important goal. To this end, we have embarked on our Create a Jewish Legacy initiative with our partners, Jewish Federation of Greater New Orleans, the Jewish Community Center, Jewish Family Service, the Community Day School, and Tulane Hillel, as well as our local synagogues and other Jewish organizations. In 2014, Patti Lengsfeld will be joining our staff as Director of the Create a Jewish Legacy project.

Our total assets continue to grow and are approaching \$45 million. Our total grants and distributions from restricted and unrestricted funds are over \$2.3 million. With the support of our donors and our prudent management, we are facing the future in the most fiscally responsible manner possible.



The following funds have been opened since our last Annual Report through November 30, 2013:

**Donor Advised:** Bissinger-Timm for the Benefit of Jewish Family Service, Jeanne Ellinport, Franco Family, Sheri Kornblum, Marshall-Katzen, Leonard E. Prelutsky Memorial, André and Robbie Rubenstein, David and Niki Rubenstein, Gayle Siegel, Ed and Betty Smith, Beverly and Lester Wainer #2, Zachor New Orleans; **Designated:** Jack C. and Clare Benjamin, Joan and Gerald Berenson 2013, Carol B. Wise to Benefit JEF;

**B'nai Maimonides:** Sydney Gold, Audrey Gold Singer; **Young Philanthropist:** Delphine Dumah Trosclair; **Charitable Gift Annuity:** Joyce Ellis.

In this Annual Report, we are featuring some cherished members of our community who passed away this year. They left generous legacies that will allow us to sustain our Jewish community for future generations.

Today, each of us has an opportunity to make a difference. There is no gift that is too small. Any donation will contribute to the security of our Jewish community. This has been a great year for investors in the stock market. You can avoid capital gains taxes, receive a current tax deduction, and provide for your favorite charities by opening a fund at JEF. Please call your financial or legal advisor, or call me at 504-524-4559 so that you can take advantage of this opportune moment.



Sandra K. Levy,  
Executive Director

## Tzedakah Award **The Cahn family**



**Front (l-r): Marie Cahn, Adele Karp Cahn, Vivian Cahn; back (l-r): Celeste Cahn, James Cahn, Elise Cahn, Richard Cahn, David Cahn. Not pictured: Jeffrey Cahn.**

The Cahn family has demonstrated extraordinary leadership and dedication through their meaningful and effective philanthropy in New Orleans' Jewish community, as well as in the community at large.

Almost 100 years ago, Michael Cahn, father of Jules and Emile Cahn and grandfather of Richard and James Cahn, founded the Dixie Mill Supply Company. Through the success of Dixie Mill, Mike Cahn and his wife, Blanche, established a private foundation. Over the years their foundation has grown, enabling Richard and Jimmy to continue the family tradition of providing financial support to organizations that benefit our Jewish community and the community at large.

Adele Karp Cahn was married to Emile (Sleepy) Cahn. Adele, who grew up in the Jewish Home, has always been particularly sensitive to the welfare of children, which led her to be a major supporter of Jewish Children's Regional Service. She also understands the hardships that people can face as they age. In 1996, she created a fund at JEF to provide assistance for seniors in our Jewish community. When she learned that senior citizens had a need for access to transportation, she agreed to use this fund for JFS's successful Catch-A-Cab program, which continues to make life easier for Jewish seniors.

Jules Cahn was a well-known photographer and documentarian of New Orleans' African American culture. His wife, June, was an attorney and was very involved in the civil rights movement as well as in the Jewish community. She served on many boards and committees. June and Jules were strong supporters of Israel and Israel Bonds.

Richard Cahn and his wife, Vivian, are involved in many Jewish and other community charitable organizations. Richard is president of Dixie Mill. He has served on JEF's Board since 2002. Vivian is an interior decorator and owner of Vivian Cahn Designs. She is a Board member and past campaign chair of Federation. Both Richard and Vivian also serve on the Boards of several other Jewish and community organiza-

tions. They are longtime supporters of Federation, JCRS, JFS, NCJW, Prospect New Orleans, NOCCA, and many other organizations. They established the Vivian and Richard Cahn Donor Advised Fund at JEF in 1980 and their son, David, established a B'nai Maimonides fund in 2007.

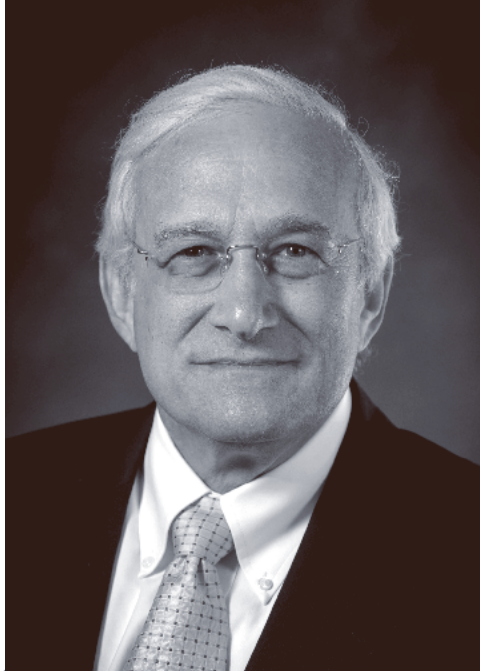
Jimmy Cahn is vice president of Dixie Mill. He and his wife, Marie, have also been involved in many charitable organizations. For many years, Jimmy was on the Board of JCRS and served on its Executive Committee. He is currently the chair of the JCRS Endowment Committee. He and Marie have been very involved and supportive of St. George's Episcopal School. They have also been benefactors of the Tulane Shakespeare Festival. They are committed to passing on the importance of giving back to the next generation.

The Cahn family has had a long-lasting impact our Jewish community. A commitment to tzedakah almost 100 years ago has been passed down through the generations to Vivian and Richard and their son, David, and Marie and Jimmy and their children, Celeste, Elise, and Jeffrey.

**"The vibrancy of our Jewish community is supported through JEF. Participation in JEF is a very effective vehicle for insuring our resilience and continuity through good as well as challenging times."**

**Richard Cahn**

**Young Family Award for Professional Excellence**



**“The Jewish Endowment Foundation is the best financial resource I know to help us perpetuate our Jewish values and institutions for generations to come.”**

**Larry Lehmann**

**Endowment Achievement Award**

**“Create a Jewish Legacy is vitally important to our community. My wife and I have already done something for the Jewish community in our wills. My hope is that everyone will follow our lead and think about how important it is to endow our community for future generations.”**

**Alan Franco**



**“Happy is the man who is rich in good deeds, for he shall be honored in life and be remembered long afterwards for his goodness.”**

**– Talmud**

**Join our ever-growing list of Jewish Endowment Foundation donors. We live on in the acts of goodness we perform. By choosing to support your community through the Jewish Endowment Foundation of Louisiana, you become one in spirit with past generations whose generous gifts are today's legacy.**

**Unrestricted Gifts** The most flexible form of giving is the unrestricted gift. This permits JEF to use its discretion to meet the most pressing needs of the day. Donors enjoy the firm assurance that their contributions will be used wisely in the face of ever-changing present and future demands.

**Unrestricted Named Funds** Income from the fund is used to support JEF and provide community grants. You can name this fund to honor or memorialize a loved one.

**Bequests** You can add a simple codicil to your will to produce a bequest to JEF's General Fund. We recommend that you consult your attorney or your accountant before making any changes or additions to your will.

**Donor Advised Fund** You can establish a donor advised fund to be maintained as a component of JEF with a gift of money or property. You have the privilege of naming the fund and recommending distributions to qualified charities subject to the approval of JEF's Board of Directors. A donor advised fund can be established with as little as \$500 and distributions can be made once the fund reaches \$10,000.

**Designated Fund** A designated fund specifies that all or part of the income earned by your gift be used for a specific purpose, agency, or field of interest. A designated fund may be established in any name you choose.

**Charitable Gift Annuity** A Charitable Gift Annuity (CGA) transfers cash, stock, or other assets to JEF and in return, the annuitant receives certain tax benefits and regular payments for life. Payments vary depending upon the annuitant's age. A CGA can be purchased for an individual or a couple. Rates are available upon request.

**Charitable Lead Trust** A charitable lead trust allows you to contribute to JEF while retaining assets for yourself or transferring them to

others. Trust income is paid to JEF for a period of years determined when you establish the trust. After that time, the principal reverts to you, your spouse, your children, or your grandchildren.

**Charitable Remainder Trust** You can establish a fund in your name or your family's name through several types of remainder trusts tailored to meet your estate planning goals and the needs of your beneficiaries. You set aside an asset for JEF while continuing to receive income from it during your lifetime. The income may continue for the life of additional beneficiaries, such as your spouse or children. Upon termination of the trust, the remaining principal reverts to JEF.

**Supporting Foundation** You can establish a supporting foundation affiliated with JEF in your name or your family's name. Your foundation will be managed by a separate board of directors that will guide its investment policies and review which charities to support. There can be major tax incentives for existing private foundations to become supporting foundations.

**Life Insurance Policy** You can donate a new or a previously existing life insurance policy to JEF. Life insurance donations can increase income tax deductions while decreasing your taxable estate. You receive an income tax deduction at the time of your gift. If you continue to pay permanent premiums on that policy, each payment constitutes a charitable contribution at that time.

**Retirement Fund** Did you know that any funds remaining in an Individual Retirement Account (IRA) or other type of retirement plan may be taxed up to 80% after your death and/or your spouse's? The taxes due on your IRA can be avoided by naming JEF as the beneficiary of your retirement plan. (The company holding your plan can provide you with a Beneficiary Designation Form.) Other assets can be left to your heirs and your Jewish community receives a significant contribution in your name.

**B'nai Maimonides Fund** Young people can become philanthropists through the B'nai Maimonides program. A bar or bat mitzvah makes a tax-deductible minimum cash gift of \$250 to JEF which is matched by \$250. The child can begin making small distributions from his or her fund immediately and JEF does not charge anything to administer the fund.

**Young Philanthropist Fund** This program allows family or friends to open a fund for a minor child with a tax-deductible gift of as little as \$500. Unlike regular donor advised funds, which cannot begin making distributions until the fund reaches \$10,000, JEF allows a child to start his charitable contributions from the fund's income immediately. There is no administrative cost reimbursement.

## Their Memories Are a Blessing

### Leaving a Legacy through the Jewish Endowment Foundation of Louisiana.

As 2013 draws to a close, we take a moment to express our condolences to the families of our Jewish community members who passed away this year. There are several that we would like to recognize for their generosity to the Jewish Endowment Foundation of Louisiana and our Jewish community. Their stories of participation and dedication to Jewish values are inspirational. Each of these wonderful people left a legacy for future generations. They planted for the future as their forebears planted for them.

**Byrde Berenson Haspel** opened a donor advised fund at JEF in 1998. As part of her estate plan, she established a charitable remainder trust naming her JEF donor advised fund as the remainder beneficiary. She received income for her lifetime and a charitable deduction taken over a number of years. At the end of her life, the remaining assets came to JEF to be distributed to several charities that she supported throughout her life. She was able to endow her Lion of Judah through this planned gift and have the pleasure of knowing that her support of Federation and our community would continue beyond her lifetime. Byrde was honored with JEF's Tzedakah Award in 2001.



**Dotsy Fisher** passed away this past spring, just a year after her husband, **Jack**. In 1995, Jack and Dotsy created a charitable remainder trust, providing them with lifetime income and a tax deduction and, through JEF, providing a lifetime legacy to our Jewish community to help future generations. René Lehmann, their nephew and attorney, advised them on their estate planning. This legacy was an important part of their plan. As Dotsy said when they established the trust, "Setting up the charitable remainder trust with JEF just seemed like the right thing to do. We established the trust because it was needed by the Jewish community, but it was also a wise business decision for us." They have left a generous legacy placed in the Dotsy and Jack Fisher Unrestricted Memorial Fund.

**"The noblest question in the world is, 'What good may I do in it?'"**

– Benjamin Franklin

**Liselotte Levy Weil** escaped the Holocaust by coming to the United States with her brother, Leo, in 1939. Sadly, they had to leave behind their mother and their younger sister, Margot. Their father had been beaten by the Nazis in 1938 and died of his injuries. Their mother and sister would not leave and died in a concentration camp in 1941. Liselotte's story is one of surviving and thriving. She never forgot those that she lost and was determined to keep their names alive and to make a difference in her Jewish community. She created a charitable gift annuity at JEF in 1998 and another in 2008, which paid her lifetime income of 8.5% and 10.2% respectively. The remainder of these annuity gifts will be held in unrestricted memorial funds in the names of Liselotte, her husband, Leo, her parents, her sister, and her brother. The legacy left by Liselotte will strengthen our Jewish community and provide support for future generations. As a survivor, it was important to her to make a financial commitment to a Jewish future.



**Oscar and Marjorie Tolmas** both passed away within two months of each other this year. Oscar was an attorney, contractor, developer, founder of Oscar Tolmas Enterprises, philanthropist, and an honorary lifetime member of JEF's Board. With the guidance of attorney Max Nathan Jr., he and Marjorie opened a donor advised fund at JEF after the death of his brother, Gerson, in 2005. Oscar accepted the option in Gerson's will to use his inheritance to benefit the New Orleans Jewish community through JEF rather than keeping the money for his own use. The decision to share his good fortune was an easy one for Oscar, for he had been following his father's practice of tzedakah for many years. On his deathbed, Oscar's father asked his son to make sure that the charities he had supported would be taken care of. Oscar's story is not just an everyday example of philanthropy. It is a tale about how his parents came to the United States with nothing and lived the American dream of success. Oscar and Marjorie gave to countless charities in the New Orleans Jewish community as well as in Israel. His inheritance from his brother became a tax-wise contribution to JEF, helping him to perpetuate the lesson of tzedakah that he and his siblings learned from their parents. By creating the Oscar and Marjorie Tolmas Donor Advised Fund, they made a commitment to a Jewish future in New Orleans.

**These beloved members of our Jewish community are wonderful examples of people who believed wholeheartedly in leaving a legacy to benefit future generations. They have provided for those that they will never know. We hope that their stories will be an inspiration to others to follow in their footsteps and consider leaving a legacy to or through JEF to sustain our Jewish community for generations to come. To discuss how you can create your Jewish legacy, please feel free to contact Sandy Levy at (504) 524-4559 or [sandy@jefno.org](mailto:sandy@jefno.org).**



# Goldring Jewish Summer Camp Experience Incentive Grant



In 2013, the Goldring Jewish Summer Camp Experience awarded incentive grants to 82 children to attend Jewish not-for-profit sleepaway camps for the first time. This wonderful program, established by JEF in 1999, has been funded by the Goldring Family Foundation since 2001. Since its inception, 1,081 children have benefitted from this program.

Children currently in grades 1 through 9 who will be attending a Jewish sleepaway camp for the first time are eligible for the program, which provides tuition up to \$1,000 per child as an incentive for families to give their children the experience of Jewish summer camp. Experts say that attending a Jewish sleepaway camp is one of the most important factors in determining a child's inclination to understand and maintain his or her Jewish heritage.

For more information, please call Ellen Abrams at 504-524-4559 or email [ellen@jefno.org](mailto:ellen@jefno.org).

I recently returned from Henry S. Jacobs camp and had the best time of my life. I am from a town where most of the kids are not Jewish. At school, I am always explaining to my friends and class mates different customs and holidays of my religion. At camp, it was different because every camper was Jewish which gave us each something in common with each other. Besides all of the fun activities such as swimming, art, adventure, games and many more, it was all of the Jewish songs I learned that was so special to me. Shabbat Services were also very special to me. The way it felt to celebrate Shabbat with so many Jewish children was something I will remember for a lifetime. It is the best feeling I felt like I was with a big family during Shabbat as well as every minute of the day! When I first asked my mother to go and she said I don't think that will be possible because she could not afford it, I was so disappointed. I came home from school one day and she said you are going to camp! My dream became a reality because of your generous donation.

## 2013 Campers

Emma Abrams	Ella Rebecca Duvdevani	Destin Hirsberg	Leah Monroe	Hannah Rosenstrauch	Alexandra Stone
Charlotte Adler	Amanda Eberts	Victoria Holdiness	Morgan Monroe	Joey Roth	Elyon Topolosky
Isaac Alton	Norman Eddy	Delia Joyner	Luke Muslow	Brennan (B.B.) Rubin	Matthew Varon
J.K. Bain	Seth Fawer	Joshua R. Kaplan	Allie B. Nork	Rebecca Rubin	Kathryn Ella Walker
Lindsey Bain	Tanner Fawer	Sylvia Kassoff	Talie Ouaknine	Ida Rose Rutkoff	Morgan Shelby Walker
Lauren Balfour	Ethan Finkelstein	Logan Katz	Emmett Paton	Noah Saperstein	Jonah Grayson Weinberger
Max Robert Barron	Jack Forman	Isaac King	Eli Perlstein	Zoe Schexnayder	Olivia Weiss
Sarah Beychok	Maya Freedman	Will Kinsella	Jackie Perlstein	Gavin Schwartz	Clay Wheeler
Hanah Bloom	Griffin Gansar	Sadie Klein	Shalom Posner	Noah Schwartz	Blake Ziegler
Josh Bloomston	Isabella Rebekah Garbeil	Gabe Ledoux	Shane Reuben-McEvoy	Max Shroyer	Sarah Zimmerman
David Bykov	Banks Gerowin	Alison Levine	Jack Roane	Gaviella Smith	Lucas Zupnik
Kirill Bykov	Sam Haber	Josie Liederman	Elizabeth K. Rodrigue	Liam Smokey	
Abby Cohn	Zachary Hagedorn	Rayna Mastin	Hannah P. Rodrigue	Reuben Stein	
Toby Conn	Hannah Halpern	Nathan McKinney			
Jordan De Los Santos	Hannah Harmon	Ella Monroe			

## Grants and Distributions



*Israeli Tzofim Scouts dazzle Metairie JCC campers with song and dance.*

### 2012 and 2013 Grants Approved from Unrestricted Funds Totaling \$141,950

The grants listed below are from JEF's General (Unrestricted) Fund. They support organizations that benefit our entire community, including the the Jewish Community Center, Jewish Family Service, Tulane Hillel, the Community Day School, and other organizations and projects of interest to our Jewish community.

Avodah: The Jewish Service Corps – Partners in Justice Jazz sponsorship  
Birthright Israel

Community Day School – Marketing Campaign (2012 & 2013)

Congregation Gates of Prayer – B'nai Maimonides Program

Goldring-Woldenberg Institute of Southern Jewish Life (2012 & 2013)

Jewish Colorado – Flood Relief

Jewish Community Center – Community-Wide Chanukah Concert,  
Candle Lighting Ceremony and Dinner (2012 & 2013)

Jewish Community Center – Holocaust Memorial Program (2012 & 2013)

Jewish Community Center – Israel Day Camp Experience

Jewish Community Center – Israel Independence Day Program (2012 & 2013)

Jewish Community Center – Social Programs for Young Jewish Professionals

Jewish Community Center – Summer Day Camp Shlichim

Jewish Community Center – Young Jews of the Crescent City (YJCC)

Jewish Family Service – Intensive Case Management Services (2012 & 2013)

Jewish Family Service – Passover Food Basket (2012 & 2013)

Jewish Federation of Peoria – Tornado Relief Fund

Jewish Federations of North America – Hurricane Sandy Relief Fund

Jewish Federations of North America – Typhoon Haiyan Relief Fund

LimmudFest New Orleans 2014

Memory Project

Moishe House New Orleans (2012 & 2013)

Tulane Hillel – Expanding Shabbat Dinner on Campus (2012 & 2013)

Tulane Hillel – Tulane Jewish Leaders (2012 & 2013)

World ORT

### DISTRIBUTIONS FROM SUPPORTING FOUNDATIONS

Totaling \$234,180

January 1, 2012 through December 31, 2012

### DISTRIBUTIONS FROM RESTRICTED FUNDS

(included Donor Advised Funds, Designated Funds,  
Field of Interest Funds and Custodial Funds)

Totaling \$1,944,532

January 1, 2012 through December 31, 2012

To the Jewish Endowment Foundation of Louisiana — \$224,485

To Federation and Affiliated Agencies — \$732,271

To Other Jewish Agencies — \$615,907

To Secular Agencies — \$371,869

The above represent distributions from supporting foundations and restricted funds at JEF that support organizations such as Federation and its constituent agencies, synagogues, medical facilities, and arts organizations, to name only a few. A list of organizations receiving distributions from supporting foundations and restricted funds is available from the Jewish Endowment Foundation of Louisiana office.

**“No one has ever  
become poor  
from giving.”**

— Anne Frank

# Financial Statement

	2012	2011
<b>ASSETS</b>		
Cash & Money Market Funds	\$5,376,077	\$2,358,658
U.S. Government Obligations	5,672,201	7,046,069
Corporate Stocks & Bonds	28,885,671	26,678,695
Hedge Funds	1,208,058	702,467
Israel Bonds	561,500	582,558
Contribution Received from Remainder Trusts	2,277,258	2,164,941
Accrued Interest Receivable	84,695	90,166
Administrative fees receivable	308,662	204,487
Other Assets	29,696	25,051
Cash Value of Life Insurance	234,377	218,974
Property & Equipment	64,721	77,652
Total Assets	<u>44,702,916</u>	<u>40,149,718</u>
<b>LIABILITIES &amp; FUND BALANCES</b>		
<b>Liabilities:</b>		
Accrued Expenses	246,525	133,876
Distribution Payable	100,693	92,953
Grants Payable	43,373	57,983
Other Liabilities	172,909	203,653
Funds Held as Custodian	5,478,535	5,544,824
Total Liabilities	<u>6,042,035</u>	<u>6,033,289</u>
<b>Fund Balances:</b>		
Unrestricted (General) Fund	4,355,498	4,028,373
Temporarily Restricted Funds	27,190,112	23,575,121
Permanently Restricted Funds	664,577	664,577
Supporting Foundations	6,450,694	5,848,358
Total Fund Balances	<u>38,660,881</u>	<u>34,116,429</u>
	<u>44,702,916</u>	<u>40,149,718</u>

JEF engages the services of Carr, Riggs & Ingram to perform an annual audit of our financial statements. Our procedures are reviewed to ensure that we follow current accounting practices. Our auditors have provided an unqualified opinion for 2012.

## OFFICERS

Carol B. Wise, *President*  
Richard Cahn, *Vice President*  
Andrea S. Lestelle, *Vice President*  
Edward L. Soll, MD, *Vice President*  
Mimi Schlesinger, *Treasurer*  
John L. Haspel, *Assistant Treasurer*  
Allan Bissinger, *Secretary*

## BOARD OF DIRECTORS

Cathy K. Bart  
Harry Blumenthal Jr.  
Robert B. Brickman  
Alan Franco  
Reuben Friedman  
Richard Friedman  
Deena Y. Gerber  
Maury A. Herman  
Marcus Hirsch  
Tamara K. Jacobson  
Jonathan Katz  
Marilyn Kullman  
Lawrence M. Lehmann  
Anne P. Lowenburg  
Betty S. Meyers  
Melinda Mintz  
Joshua L. Rubenstein  
Julie P. Silbert  
James M. Spiro  
Mark S. Stein  
Michael L. Stern  
Max. Tobias Jr.  
Beverly Wainer  
Walter H. Weil III  
Marc J. Yellin  
Marilyn Paillet Zackin

## HONORARY BOARD MEMBERS

Michel Brener ▲  
Robert B. Haspel, MD ▲  
Shirley K. Haspel  
Helen A. Mervis ▲  
Oscar Tolmas ▲

**This report is underwritten in part by Carr, Riggs & Ingram.**

## PAST PRESIDENTS

Charles A. (Rusty) Levy III  
*Immediate Past President*  
Ian Arnof  
Charles Bennett ▲  
Marvin L. (Buddy) Jacobs ▲  
Shepard M. Latter ▲  
Sanford R. Maslansky  
Joel A. Mendler  
Bernard D. Mintz ▲  
Max Nathan Jr.  
Carole Cukell Neff  
Rickie Nutik  
Joe Pasternack Jr.  
Joyce S. Pulitzer  
Leon H. Rittenberg Jr.  
Roswell J. Weil  
Linda B. Wiener  
Ellen S. Yellin

## EX-OFFICIO

Morton H. Katz,  
*President, Jewish Federation*  
Michael Weil,  
*Executive Director, Jewish Federation*

## STAFF

Sandra K. Levy, *Executive Director*  
Ellen Abrams,  
*Projects Coordinator/Grants Director*  
Maggie Bothwell,  
*Donor Relations Manager*  
Doris Gauthier, *Controller*  
Sheila K. Gold, *Assistant Director*  
Aleshia Goodlow, *Accounting Assistant*  
Nedra Wilson, *Administrative Assistant*

We have made every effort to accurately recognize all of our donors. We sincerely apologize if your name was listed incorrectly or inadvertently omitted from this publication. Please contact the JEF office for corrections and additions.

Annual Report Layout: Ed Biggs  
Photos: Jose L. Garcia II

Several of our cherished JEF donors have passed away since our last Annual Report. They have been a part of JEF and have remembered JEF and our Jewish community during their lifetimes and/or at the end of their lifetimes. They have helped to secure a Jewish future for generations to follow. We honor and thank these donors and their families for making a difference and creating their Jewish legacies.

David Bernstein  
Dorothy (Dotsy) Fisher  
Julian Good  
Byrde Berenson Haspel  
Edward M. Heller  
Marvin L. (Buddy) Jacobs  
Marjorie Tolmas  
Oscar Tolmas  
Liselotte Levy Weil

**As my ancestors planted  
for me before I was born,  
so do I plant for those who  
will come after me.**

**— Talmud Ta'anit**

# The Jewish Endowment Foundation of Louisiana: Preserves the past, supports the present, and invests in the future of our Jewish community



## CREATE A JEWISH LEGACY



Since 1967, the Jewish Endowment Foundation has served as a repository of funds for planned giving, sustaining our Jewish community by assisting in emergencies and encouraging new projects and initiatives. JEF has an outstanding reputation for responsible investing and is trusted to steward charitable funds for many of our Jewish organizations and individuals. JEF's General Fund played a vital role in our Jewish community by contributing to the renewal effort following Hurricane Katrina.

the time to make plans now and to let JEF know about them. Sandy Levy (504-524-4559 / sandy@jefno.org) at JEF will be happy to talk to donors about giving options. Donors can also consult with their attorneys to structure their wills or provide a planned gift so that local Jewish organizations and synagogues will continue to thrive for the future of our Jewish community. The future lies in your hands.

## The Basics of the Create a Jewish Legacy Program

With an eye on the future, JEF and its partners (see below) started Create a Jewish Legacy in 2009. The program concentrates on safeguarding our beloved Jewish community by creating endowment funds, which are invested and grow in perpetuity. One way to create a Jewish legacy is for donors to leave a bequest in their wills so that a dollar amount or percentage of their estate can be placed in a fund at JEF. Donors identify which specific agencies, synagogues, charities, or charitable causes they would like to benefit, and JEF then stewards the fund and distributes the income or a predetermined amount to the donors' chosen entities. Another simple way to give is for a donor to designate JEF as a beneficiary of a life insurance policy or retirement plan.

## Building for the Future

So far, the Create a Jewish Legacy program has received 85 Declarations of Intent, which are promises by individuals interested in creating their Jewish legacy. In addition, 60 legacy commitments have been established, meaning actual provisions have been made for a gift through a bequest or other method, or through cash gifts that have been made to a fund. Almost \$9 million in future gifts have been promised for the Jewish community through the Create a Jewish Legacy program.

JEF and its partners in Create a Jewish Legacy sincerely hope that every Jewish person in the Greater New Orleans area will take

## The following organizations and synagogues are partners in Create a Jewish Legacy:

The Jewish Endowment Foundation of Louisiana  
The Jewish Federation of Greater New Orleans  
Jewish Family Service of Greater New Orleans  
The New Orleans Jewish Community Center  
Community Day School  
Tulane Hillel  
Henry S. Jacobs Camp  
Jewish Children's Regional Service  
National Council of Jewish Women  
– Greater New Orleans Section  
Congregation Beth Israel  
Congregation Gates of Prayer  
Congregation Temple Sinai  
Northshore Jewish Congregation  
Shir Chadash Conservative Congregation  
Touro Synagogue

**No matter what vehicle a donor decides to use to make a legacy gift, JEF wants to make giving as easy as possible and will work with the donor to find the best plan.**