

JEWISH ENDOWMENT FOUNDATION OF LOUISIANA

Annual Report 2015



FUNDING FOR OUR FUTURE

In this Annual Report, we are featuring quotations from signers of JEF's Book of Life from several years ago. When donors create a Jewish legacy, they can inscribe a personal message to future generations in the Book of Life, briefly telling their family stories and expressing their thoughts about tzedakah. We are inspired by these statements.

"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 secures the future of our Jewish Community.

A YEAR IN REVIEW



At the end of each year, we look back at the progress we have made in accomplishing our mission of sustaining our Jewish community now and for the future.

> As we go to press, our foundation has almost \$50 million in total assets under administration. Our General (Unrestricted) Fund is approaching \$3.7 million. In 2014 and thus far in 2015, we have granted \$120,650 from our General Fund. Our donors, through donor advised, designated, and custodial funds and supporting foundations, granted more than \$3.5 million last year - the largest amount ever. Our Jewish community continues to be a leader in philanthropy in the Greater New Orleans area.

With your support and our prudent management, we are facing the future with sustained fiscal responsibility. We are grateful to each of you who has contributed to and partnered with JEF for your confidence and contributions. You are securing the future of our community.

The following funds have been opened since our last Annual Report through November 1, 2015: Donor Advised: Phyllis and Jack Alltmont, Court 13 Arts, Albert and Pearl Daube #1, Albert and Pearl Daube #2, Richard and Ina Davis, Greg Friedler for Creative Expression, Louis and Lillian Glazer Family, Bella Goldman Memorial, JFGNO Allocations Endowment, JoAnn and Larry Katz, NGCF, Roswell J. Weil Memorial; Designated: Byrde B. Haspel Make-A-Wish Foundation, Byrde B. Haspel NCJW, Byrde B. Haspel United Way, Maury A. Herman JFGNO, Harold Wainer; Custodial: Touro Synagogue Hunger, Charles Zucker; B'nai Maimonides: Emma Stotter Benjamin, Kaitlin L. Gelman; Young Philanthropist: Daniel Jacob Wise; Supporting Foundation: Charles D. Zucker; Insurance: Joshua L. Rubenstein.

This year we have received very generous donations from community members who have passed away. They supported our Jewish community during their lifetimes and now, through their legacies, in perpetuity. We are most grateful to Charlie Zucker, Babs and J.E. Isaacson, Al Daube, and an anonymous donor.

In this Annual Report, we are featuring a few community benefactors who have created Jewish legacies and signed JEF's Book of Life. Quotations from their Book of Life statements will be found throughout this report.

You, too, can be a benefactor and share your thoughts in our Book of Life. Your generosity and support can live on. By creating your Jewish legacy, you can help assure that our Jewish community remains strong for future generations.

Each of us has an opportunity to make a difference. If you have not given to JEF before, please consider doing so now. There is no gift that is too small; any donation will contribute to the safekeeping of our Jewish community. You can remember a special occasion or a loved one or just support JEF with a donation to the General Fund in the enclosed envelope.

In a world filled with turmoil and uncertainty, securing our future is critically important. Be a part of JEF today and tomorrow. Please call your professional advisor, or call Sandy Levy or Patti Lengsfield at JEF at 504-524-4559 to help you take advantage of this tax-wise giving opportunity.

With best wishes for a happy and healthy 2016,

Richard Cahn, PRESIDENT

Rive m Com

Saundra K. Levy, EXECUTIVE DIRECTOR

Saurden K. Lerey

TZEDAKAH AWARD



Beverly and Lester Wainer

are generous, caring, and modest philanthropists; devoted to their family, their synagogue and the New Orleans Jewish community, with a strong commitment to Judaism and Jewish values.

Beverly and Lester met in September 1955 in the Fountain Lounge in the Roosevelt Hotel, each with another date. The following May, Beverly was in New Orleans and they reconnected. They married

in Beverly's home town of Atlanta in September 1956 and have lived "happily ever after" for 59 years. They consider themselves two of the most fortunate people in the world.

As a married couple, Beverly and Lester immediately became involved in the Jewish community. They have served on synagogue and youth group boards, Willow Wood, B'nai B'rith and JEF boards. Beverly was co-chair of the Touro Hospital Gift Shop and both were involved with the Jewish Welfare Fund. Lester was one of three men from New Orleans invited to Israel to meet with Golda Meir, although he was unable to go.

Beverly and Lester opened a donor advised fund at JEF in 1986. In 2011 they donated that fund to JEF's General Fund. They also made a donation to fund the Visiting Professor of Jewish Studies Program at Loyola University in JEF's name. They opened another donor

advised fund in 2012. Beverly has also endowed her Lion of Judah at JEF and is a member of JEF's Board of Directors.

Beverly and Lester, their children and grandchildren have set an example of tzedekah and leadership for our Jewish community. The entire Wainer family have been and continue to be outstanding, quiet philanthropists. In the truest sense of charitable giving, they have shared their good fortune and enriched our Jewish community.

"We have had a wonderful, fortunate life. It's a blessing for us to be able to give back and JEF is the perfect partner for our philanthropy."

Beverly and Lester Wainer

YOUNG FAMILY AWARD FOR PROFESSIONAL EXCELLENCE



"I have been fortunate to work with clients to create plans to fulfill their philanthropic goals. It was very rewarding to be able to assist Charlie Zucker in creating a Jewish legacy at JEF, where he knew his gift would be safeguarded and wisely used."

David Kushner

"Over the past several years I have had the good fortune of working with JEF on personal and professional levels. My family has established a Donor Advised Fund. JEF provides a wonderful service to the Jewish community and a solid base for those who have charitable goals both during life and in their wills."

Mark Stein



ENDOWMENT ACHIEVEMENT AWARD



"Creating a Jewish Legacy fund through JEF allows me to provide financial support for the future of our Jewish community. My family and I have been the beneficiaries of those who came before us; it is time for us to continue this generational chain: L'dor v'dor."

Mike Wasserman

DONORS UNRESTRICTED GIVING

Jack Eisenberg▲

These generous donors have made gifts to the **JEF General Fund as** of November 1, 2015. The categories below represent cumulative gifts since 1967.

\$100,000 OR MORE

Elias Bowsky▲ Michel Brener John M. DeBlois Dora Ferber▲ Dorothy (Dotsy)▲ and Jack▲ Fisher Diane and Alan Franco Mr.▲ and Mrs.▲ Israel Goldberg Goldring Family Foundation Shirley K. and Robert B.▲ Haspel Babette (Babs)▲ and J.E. A Isaacson Dorothy and Marvin L. Jacobs

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Garon

▲ Deceased

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It is a special joy for us to be able to continue the tradition of Tzedakah transmitted to us by our parents and grandparents and in so doing to set an example for our children.

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Ruth Helen Young Memorial

Dr. and Mrs. Carl H. Weinberg Memorial

Charles Zucker Memorial

Dotsy and Jack Fisher

Throughout our married life we have, in a quiet way, participated in and contributed to our Jewish community. It is our sincere hope that by now declaring our previously anonymous commitment, we shall motivate others to share in the mitzvah of giving.

New Fund ▲ Deceased

SUPPORTING FOUNDATIONS

Congregation B'nai Israel Endowment

Dr. and Mrs. Isidore Cohn Jr. Holley Pavy and John M. DeBlois

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JCC Building #2

JCC Feil Family #1

JCC Feil Family #2

Jewish Family Service Julanne Isaacson Staff Development

Julie Grant Meyer

... my parents... and my grandparents... gifted me with love, devotion, and a Jewish education. They taught by example: work hard, share everything, and leave the world more repaired than it was previously. Through the donor advised fund that bears their names, the work they began will endure for generations to come.

DONOR FUNDS (CONTINUED)

Jewish Federation of Greater New Orleans-Gaba

Jewish Federation of Greater New Orleans-Garon

JFGNO Special Purposes

National Council of Jewish Women-Greater New Orleans Section Endowment

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New Orleans Jewish Day School Education

Alan Rosenbloom Jewish Community Center Endowment

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Richard Adam Levin

Jordan Adam Lieberman

Mindy Erin Lieberman

Lily Rebecca Lupin

Joseph Lustig

Sarah Lustig

- - -

Rachel Mann

Edith Sharon Margolis

Jonathan May

Nicholas May

Zachary Melchiode

Isabelle Meyers

Marlee Michaels

Max Michaels

Garrett Moore

Eli J. Murov

Laura M. Nussdorf

Daniel Marc Olivier

_

David Nick Olivier

Sophie Ruth Oreck Aaron R. Perles

Auton N. 1 ches

Max Perlstein

Sydney Rebecca Plotkin

Hannah Rau

Amos Yoseph Remer

Brooke Rittenberg

Lee H. Rittenberg IV

Rachel Cohen Rosenzweig

Missy Elizabeth Ross

Brett Salus

Ariane Schaffer

David E. Scharff

Erik E. Scharff

Daniel G. Silbert

Audrey Gold Singer

Bette Rachele Solomon Maeve Spanier

Hannah Springer

Ilana Springer

Ashley Sterbcow

Eli Sterbcow

Gabrielle Shoshana Stone

Sarah Arden Sweet

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Ali Rian Tanenbaum

Blair Tanenbaum

Corbin M. Tanenbaum

Zachary Tanenbaum

Joshua B. Tarr

Kayla R. Tarr

Max Vizelberg

Tova Leah Weiss

Margaret Willis

Jamie Yager

Kyla A. Yager

Rebecca Zerlin

Blake Ziegler

YOUNG PHILANTHROPIST FUNDS

Blake Ethan Amann

Carrie Bart

Michelle Bart

Kerena Bernstein

Lylah Jazz Bernstein

Manya-Jean Gitter

Liza Rebecca Gutentag

Alia London Hirsch

Eden Dreyfus Hirsch

Emet Zwelling Hirsch

Levi Adler Hirsch

Levi Adier Hirsch

Madelaine C. Hirsch

Olivia Sarah Hirsch

Reuben A. Hirsch Clara Dee Lyon

Gideon Lyon

Marianne and Dr. Isidore Cohn Jr.

Our families have lived in this wonderful country for years; we are fortunate to be members of the fourth generation. We strive to live as our ancestors have taught us: "Do unto others as you would have others do unto you."

New Fund

▲ Deceased

Sydney Lauren Mimeles Jordan Saunders Moses Max Gustave Moses Samuel Teller Moses Zoe Wise Oreck Jake E. Sucan Logan Jace Sucan Lia Grace Toporek Mason Samuel Toporek Delphine Dumah Trosclair Courtney Wainer Joshua Wainer Benjamin Wilkins Jonathan Wilkins

TRUSTS

Zachary Wilkins

Daniel Jacob Wise

Abbe Burd Living Trust Sam Burd Charitable Remainder Trust Robert and Lorynne Cahn Family Charitable Remainder **Annuity Trust** Anonymous Charitable Remainder Unitrust Friedman Family Charitable Lead Annuity Trust Margot Strauss Garon Charitable Remainder **Annuity Trust** Harriet and Maurice Handelman Charitable **Lead Trust** Sandra P. Heller Charitable Lead Trust

Ann and Jon F. Leyens Charitable Remainder Unitrust Pearl and Dave Meltzer Charitable Remainder Unitrust M.E. Polson Charitable Remainder Annuity Trust Anonymous Charitable Remainder Annuity Trust Marilyn Kaffie Rosenson Charitable Remainder Unitrust Leonard M. and Frances Sontheimer Wolff Charitable Remainder Annuity Trust

CHARITABLE GIFT ANNUITIES

Janet Aschaffenburg A Joyce Ellis Linda Goldman Green Jack A. Hudson J.E.▲ and Babs▲ Isaacson Elsie Karesh▲ Mildred and I. Jay▲ Krieger Razelle Midlo Lehmann René Lehmann Maline M. Levy Saundra K. Levy Saundra K. Levy #2 Henrietta Meyers Mattise A Mollye and William Smolkin Liselotte Levy Weil A Liselotte Levy Weil #2 ▲ Joel Weinstock

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Deborah S. Cavalier Steven J. Cavalier Jan S. Glade Lisa J. Heller Mark H. Heller Marvin L. Jacobs Tamara K. Jacobson Brian H. Kaplan Brian Katz Lisa Katz Charles D. Marks Peter A. Mayer Joel A. Mendler Melanie Rae Mexic Sheryl Ann Mexic Carole Cukell Neff Julie Wise Oreck Arthur C. Pulitzer Joshua L. Rubenstein Patricia C. Ungar Harrel A. Zivitz

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Babette S. (Babs) Isaacson A Tamara Jacobson Lis Kahn Carole Katz Lisa Katz Anne P. Lowenburg Tamara B. Mayer▲ Julie Grant Meyer Lois Mexic▲ **Betty Meyers** Julie Wise Oreck Karen Z. Soll Nancy Bissinger Timm Anne G. Uhry▲ Patricia C. Ungar Beverly Wainer Lynne Wasserman Linda B. Wiener Carol B. Wise Frances S. Wolff

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Dr. Gerald Berenson Allan Bissinger Morris Campell A Steven J. Cavalier R. Justin Garon Mark H. Heller Albert▲ and Rea▲ Hendler Hugo Kahn Brian Katz William D. Norman Family Drs. Judy and Paul▲ Roheim Milton Rosenson▲ Michael Wasserman, MD



DONORS: CREATE A JEWISH LEGACY

These individuals have fulfilled their commitment to Create A Jewish **Legacy for future** generations with a gift to the Jewish Endowment Foundation or through JEF to a Jewish charitable organization.

Dorlene Alaynick Ian Arnof

Cathy Bart

Emily Ann▲ and Jack C. Benjamin

Jennifer and Jack C. Benjamin Jr.

Joan Seidenbach Berenson and Dr. Gerald S. Berenson

Allan Bissinger

Marjorie and Roger▲ Bissinger

Harry Blumenthal Jr.

Juanita and Harold▲ Bohn

Jane Bories

Jay L. Buckman

Abbe Burd

Adele K. Cahn

Marie and James Cahn

Vivian and Richard Cahn

Robert and Lorynne Cahn

Leonard and Pauline Carp

Dr. Deborah Cavalier

Dr. Steven Cavalier

Dorothy and John▲ Clemmer

Marianne and Dr. Isidore▲ Cohn Jr.

Michael Davidson

John DeBlois

Ann C. Fishman

Mr. and Mrs. Albert Fraenkel II

Cecele ▲ and Francis L.

Fraenkel

Diane and Alan Franco

Pam and Frank ▲ Friedler Jr.

Linda and Richard Friedman

Thelma and Morton▲ Gaba

Margot Strauss Garon and Herbert J.▲ Garon

R. Justin (Bobby) Garon and

Robin Levy

Ana and Dr. Juan Gershanik

Jacqueline Mae Goldberg

Carol and Louis ▲ Good Jr.

Carol Grant

Linda Goldman Green

Harriet and Maurice▲

Handelman

Shirley and Dr. Robert▲

Haspel

Sandra and Edward M.

Heller

Mark and Lisa Heller

Susan and William D. Hess

Rachelle and Marcus ▲ Hirsch

Jack A. Hudson

Harris Hyman III, MD

Dotty and Marvin L. (Buddy)▲ **Jacobs**

Tamara K. Jacobson

Mr.▲ and Mrs. Jay M. Jalenak

Lis and Hugo Kahn

Susan Mintz Kantrow

Mr. and Mrs. Brian Kaplan

Allan L. Katz

Brian and Lisa Katz

Gerson▲ and Mirtala Katz

Carole and Morton Katz

Richard Katz

Betty and Ira▲ Kohn

Mildred and I. Jay▲ Krieger

Ruth and Lawrence Kullman

Jonathan Lake

Dashka Roth and

Lawrence Lehmann

Razele Midlo Lehmann and René Lehmann

Maline M. Levy

Saundra K. Levy

Ann and Jon F.▲ Levens

John S. Loeb

Anne P. and Richard H.A

Lowenburg

Frances and Bernard Marcus

Charles D. Marks

Barbara and Sanford

Maslansky

Tamara▲ and Peter Mayer

Pearl and Dave Meltzer

Toby and Joel A. Mendler

Lois▲ and William Mexic

Julie Grant Meyer

Betty Meyers

Linda and Albert▲ Mintz

Jean and Saul A.▲ Mintz

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Richard Neff

Doris and William D. Norman Jr.

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Lillian and Sidney Opotowsky

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Sherri and Matthew Tarr Nancy Bissinger Timm

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Joel Weinstock

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Wiener

Carol B. Wise

Frances S. and Leonard M.A

Wolff

Ellen and Marc Yellin

Harrel Zivitz

Linda▲ and Dr. Jack Zoller

The following deceased individuals, by their generosity during their lifetimes or upon their deaths, provided lasting legacies for the benefit of our Jewish community. May their memories be for a blessing.

Jean K. Abbott

Miriam F. Alcus

Janet and Eugene

Aschaffenburg Jean Avegno

Alex Berger



▲ Deceased

Lila and David Bernstein

Alan V. Bories

Elias Bowsky

Peggy and Charles Bennett

Michel Brener

Moses Brener

Betty Jean Barnett Bresler

Mr. and Mrs. Meyer Brill

RoseMary Rotman Brooks

Mildred P. Brown

Richard A. Brunswick, MD

Sam Burd

Maurice Burnstein

Morris Campell

Rosalie Cohen

Pearl and Albert Daube

Sarah Davis

Mayer L. Dresner

Ruth Dreyfous

Jack Eisenberg

Arthur Feitel

Dora Ferber

Dotsy and Jack Fisher

Elise Yarrut and Ralph H.

Fishman

Pearl Taul Flaumhaft

Bea and Harold Forgotston

Irving Gerson

Mr. and Mrs. Israel Goldberg

Carl Goldenberg

Pauline and Abe Goldfarb

Louis K. Good Jr.

Fannye and Alexander

Gottsegen

Maria K. and Mauriciu A.

Granet

Monja Grodsky

Emilie Gruenberg

Louis Gureasko

Anna Levand Haber

Drs. Evelyn and Shea Halle

Byrde Berenson Haspel

Harry Herman

Ruth Herzog

Marks Isaacs

Babs and J.E. Isaacson

Sydney Jacobs, MD

Anna and Samuel Kamin

Libby and Jack Kaplan

Elsie Karesh

Ida and Harry Katz

Miriam Pailet Katz

Sam Katz

Irma Moses Kessler

Hilda Klein

Robert L. Kohlmann

Edith Deutsch Lashman

Helen and Henry Lasoski

Shepard Latter

Gabriela Lehmann

Nat and Will Leon

Bruce Levy

Ruth E. Levy

Harmi I interes

Harry Liwerant

Abe, Jack and Rose Manheim

Rose Wainer Mansberg

Aaron F. Marcus

Allen Marks

Toby Ginsburg McNamara

Doris K. and Lee H. Meltzer

Leopold Mendler

Margot Mendler

Helen A. Mervis

Hannah Aronson Meyer

Dorothy and Bernard D. Mintz

Donald Mintz

Jeannette G. Mintz

Samuel Mintz

Virginia Moyse

Rosalie Bowsky Newman

Mrs. P. Roussel Norman

Mrs. William D. Norman Sr.

A.B. Oppenheim

Helen and Dr. Ellis Pailet

Nathan Phillips

Bluma and Dr. Nathan H.

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Shalett

Esther Sinauer

Mr. and Mrs. A. Louis Sizeler

Irvin S. Smith

Bertha L. Sontheimer

Melba and Moise Steeg

Elizabeth Steiner

Margery K. and Charles Stich

Babette Katz Syvert

Gerson Tolmas

Marjorie and Oscar Tolmas

Anne G. Uhry

Edmund J. Ullman

Cecile and Dr. Gene Usdin

Leo Van Os

Helen and George Wainer

Uriah Wainer

Dr. Mollie and Mervin Wallick

Alberta Wasserman

Liselotte Levy Weil

Roswell J. Weil

Roger D. Weill

Dr. and Mrs. Carl H. Weinberg

Ben Weiner

Mamie R. Weinstein

John L. Weinstock

Richard M. Wise

Willy and Erna Wolff

Solomon Wolfson

Jeanne and Morris Wright

Fannie and Simon Yokor

David B. Young

Ruth Helen Young

Helen Weil Young

Charles Zucker

Joyce Samuelson Pulitzer and Sidney Pulitzer

Tzedakah is a heritage and privilege of sharing the many blessings of our lifetime with our Jewish Community. Our parents taught us love and devotion for Judaism and Israel. We hope that this commitment will serve to instill in our children, grandchildren, and their children the same spiritual guidance that has blessed us with good health, happiness and peace.

WAYS TO GIVE

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's Board of Directors 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.

BEQUESTS

You can add a simple codicil to your will to include a bequest to JEF's General Fund. We recommend that you consult your professional advisor before making any changes or additions to your will.

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.

DONOR ADVISED FUND

You can establish a donor advised fund to be maintained as a component fund of JEF with a gift of money or property. You have the privilege of naming the fund and recommending distributions to qualified charities over time. 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 the fund be used for a specific agency, purpose, or field of interest. A designated fund may be established in any name you choose.

CUSTODIAL FUND

An Agency Custodial Fund allows distributions to be made from the initial investment and earnings at any time. JEF holds and invests the funds with our other funds according to the agency's investment choice. The non-profit agency owns the money - JEF is only the custodian. JEF and the agency may revoke this contract with a 10-day notice and the funds will be returned to the agency within 14 days.



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 less taxed 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 there is no fee 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 fee to administer the fund.

Carol B. Wise

Philanthropy is an intrinsic part of my life. Giving of wealth is important, but personal involvement is an equally important ingredient... I hope this philosophy will influence my family and my friends to fully participate in a way of life that brings me so much joy and satisfaction.

GOLDRING JEWISH SUMMER CAMP EXPERIENCE INCENTIVE GRANT

In 2015 the Goldring Jewish Summer Camp

Experience awarded incentive grants to 87 children to attend Jewish not-forprofit 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, 1,226 children have benefitted from this program. Children from Louisiana, Alabama, Mississippi, and the Florida Panhandle currently in grades 1 through 9 who will be attending a Jewish not-for-profit 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. JEF is proud to play a role in this significant program.

Pear, Galdring Family Foundation and Jevish Endowment foundation or Louislaho

I had Such a wonderful time at Jacobs Camp!!! At my school we are the only Jewish Kids and when I came to camp it was like my School but they were all jewish. Sometimes at School My Class has a Christmas party and hot a Hanukl ah. partx. So Sometimes it's hard because thore are no Jewish Kids a roun and my school does not know what Hanukkah is I meti so many new friends and had a great time and can't wait to come back next year !!!!!!!!!

2015 Campers

Sydney Eleanor Alltmont Malena Belle Altmann Emily Arenson Naomi Camille Austin Sophia Elener Austin Eliana Rebecca Bachrach Samuel Elijah Bachrach Luc Bauduc Hannah Bienvenu Arianna Bonen Edan Bonen Rosalie Box Avery Brainis William Braunig Anna Brickman Jacob Brickman Eli Butler Isaac Butler Ryan Cato Isabella Danzig Samuel Danziq Lillie Catherine Dodd Owen Michael Dodd Omer Duvdevani Ana Lee Finger Yael Fleekop Lila Fleisig Erica Friedland Campbell Meredith Gill Naomi Gillis

Maya Goldin Max Grossman Anva Grue **Eleanor Guichet** Jacob Guichet Rowen Guthikonda Henry Haber Noah Hagedorn Sydney Hurst Frances Z. Kantrow Lauren Kaplan Sarah Kaplan Mariel Kassoff Jonah Kipp Gus Kiefer Max Klein Benjamin Ryan Kornman Allyson Lapidus Sarah Levingston Austin Kent Lewis Hanna Lichtenthal Zoey Lincove Alexander Lupin David Moretsky **Grant Muslow** Kathryn Reece Myers Noa Helene Nasoff Reed Nelson Risha Nemes

Nathan Patron

Simon Promoslovsky Abraham Weinstein Qualls Gabriel Weinstein Qualls Brooke Rhianna Rayborn Michael "Aiden" Rayborn Max Harrison Reihs Shalom Richard Joshua Ivan Rosenfeld Nolan James Rosenfeld Ella Rosenthal Alexis Paige Rothenberg Robert M. (Bobby) Rutkoff Camille Saperstein William Schexnayder Jackson Seidman Lauren Shapiro Liana Shapiro Micaela S. Shemper Jacob B. Smith Richard B. Smith Madison Soboul Charlie Vosburg Harry A. Walczak Harrison Richard Walker Adam Watson Levi Watson Miriam Youngblood



"Train up the children in the way they should go and even when they are old, they will not depart from it."

Proverbs 22:6



GRANTS AND DISTRIBUTIONS

2014-2015 GRANTS APPROVED FROM UNRESTRICTED FUNDS

TOTALING \$120,650

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

Avodah: The Jewish Service Corps Baton Rouge Hadassah - Women's Retreat Jewish Community Center - Community-Wide Chanukah Concert and Dinner (2014 & 2015)

Jewish Community Center -Holocaust Memorial Program (2014 & 2015)

Jewish Community Center -Israel Independence Day Program

Jewish Community Center - Pre-K Expansion

Jewish Community Center -

Summer Day Camp Shlichim (2014 & 2015)

Jewish Community Day School -

Curriculum Mapping

Jewish Community Day School -

Marketing Campaign

Jewish Community Day School -

Young Baby Program

Jewish Family Service - Geriatric Family Consultation Service

Jewish Family Service -

Intensive Case Management Services (2014 & 2015)

Jewish Family Service -

Passover Food Basket (2014 & 2015)

Jewish Family Service/Jewish Community Day School -**Educational Programming & Counseling**

Jewish Federation of Greater Houston - Flood Relief

Jewish Federation of Greater New Orleans -Katrina At Ten

Jewish Federations of North America -

France Emergency Fund

Jewish Federations of North America -

Stop the Sirens Campaign

Tulane Hillel - Expanding Shabbat Dinner on Campus (2014 & 2015)

Tulane Hillel - Tulane Jewish Leaders (2014 & 2015)

WYES - The Story of the Jews

DISTRIBUTIONS FROM NAMED FUNDS

January 1, 2014 through December 31, 2014

Distributions from supporting foundations and restricted funds at JEF 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.

Distributions from Named Funds

Distributions from Restricted Funds

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

Distributions from Supporting Foundation				
Total	\$3,495,209			
To Secular Agencies	\$1,091,152			
To Other Jewish Agencies	\$1,091,090			
To Federation and Affiliated Agencies	\$1,097,600			
To the Jewish Endowment Foundation of Louisiana	\$215,367			

Distributions from Supporting Foundation

\$245,447

Total	\$3,740,656

Total

"...in the end we are not measured by what we have, but by what we give to one another."

– Julie Salamon, Rambam's Ladder



FINANCIAL STATEMENT

	2014	2013
Assets		
Cash & Money Market Funds	3,221,773	4,663,542
U.S. Government Obligations	2,640,678	5,638,912
Corporate Stocks & Bonds	39,189,394	33,893,380
Hedge Funds	1,391,900	1,311,123
Israel Bonds	530,000	530,500
Contribution Received from Remainder Trusts	1,612,091	1,642,046
Accrued Interest Receivable	95,640	91,703
Administrative fees receivable	354,391	349,222
Other Assets	11,022	2,618
Cash Value of Life Insurance	282,197	266,099
Property & Equipment	76,344	64,995
Total Assets	\$49,405,430	\$48,454,140
Liabilities & Fund Balances		
Liabilities:		
Accrued Expenses	270,963	258,579
Distribution Payable	122,844	123,061
Grants Payable	63,906	44,000
Other Liabilities	77,474	109,611
Funds Held as Custodian	5,824,257	5,931,698
Total Liabilities	\$6,359,444	\$6,466,949
Fund Balances:		
Unrestricted (General) Fund	5,339,595	5,186,141
Temporarily Restricted Funds	29,438,269	28,815,261
Permanently Restricted Funds	664,577	664,577
Supporting Foundations	7,603,545	7,321,212
Total Fund Balances	\$43,045,986	\$41,987,191
Total Liabilities and Fund Balances	\$49,405,430	\$48,454,140

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.

OFFICERS/BOARD/STAFF

OFFICERS

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Andrea S. Lestelle, EXECUTIVE
VICE PRESIDENT

Morton H. Katz, VICE PRESIDENT
Lawrence M. Lehmann, VICE PRESIDENT
Mimi M. Schlesinger, TREASURER
John L. Haspel, ASSISTANT TREASURER
Allan Bissinger, SECRETARY
Alan Franco, ASSISTANT SECRETARY

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Beverly Wainer
Marilyn Pailet Zackin

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Carol B. Wise,
IMMEDIATE PAST PRESIDENT

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Edward L. Soll, MD, PRESIDENT, JEWISH FEDERATION OF GREATER NEW ORLEANS

Michael Weil, EXECUTIVE DIRECTOR, JEWISH FEDERATION OF GREATER NEW ORLEANS

STAFF

Saundra K. Levy, EXECUTIVE DIRECTOR
Ellen Abrams, PROJECTS/GRANTS DIRECTOR
Maggie Bothwell, DONOR RELATIONS

Amy D'Aquila, ADMINISTRATIVE ASSISTANT
Doris Gauthier, CONTROLLER
Aleshia Goodlow, STAFF ACCOUNTANT
Patti H. Lengsfield, LEGACY DIRECTOR

▲Deceased ■ Katz-Phillips Intern

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.

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

WE REMEMBER THEM...

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.

Albert Daube Libbye Gordon J.E. Isaacson Irvin Smith
Isidore Cohn Jr., MD Babs Isaacson Albert Mintz Roswell Weil

They left this world better than they found it. May their memories be a blessing.

CREATE A JEWISH LEGACY

The Jewish Endowment Foundation of Louisiana:

Preserves the past, supports the present, and secures the future of our Jewish community

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 plays a vital role in our Jewish community by contributing to the important programs and Jewish agencies in our community.

CREATE A JEWISH LEGACY PROGRAM: THE BASICS

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 working with donors to create endowment funds, which are invested and grow in perpetuity. One way to create a Jewish legacy is for a donor to make a gift to JEF in his or her will. The donor identifies which specific agencies, synagogues, charities, or charitable causes he or she would like to benefit. 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

Since 2009, when Create A Jewish Legacy was launched, many legacy commitments have been created. Almost \$20 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 time to make plans now to be a part of Create A Jewish Legacy. Sandy Levy (504-524-4559 / sandy@jefno.org or Patti Lengsfield (504-524-4559 / patti@jefno.org) at JEF will be happy to talk confidentially with donors about giving options. Donors should also consult with their attorneys and/or other professional advisors about their philanthropic plans that will help ensure the future of our Jewish community. The future lies in your hands.

OUR 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 Jewish 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

What will your legacy be?

