VISION FOR THE FUTURE

JEWISH ENDOWMENT FOUNDATION ANNUAL REPORT 2019

Don't judge each day by the harvest you reap but by the seeds you plant.

ROBERT LOUIS STEVENSON

GUIDING

Dear Friends,

This past year was one of growth and planning. At the end of 2019, the Jewish Endowment Foundation of Louisiana's (JEF) assets under management grew by almost \$10 million to more than \$68.5 million. This significant increase was due to strong investment returns, a favorable market, and \$6.8 million in new money, including the completion of many gifts promised over the years. JEF has continued to meet the needs facing our New Orleans Jewish community as well as other Jewish and secular organizations nationally and internationally with grants in excess of \$4.5 million from our donor advised funds, designated funds, custodial funds, and supporting foundations.

Last year, we distributed nearly \$140,000 in grants supporting the work of our local Jewish organizations from JEF's General Fund. These funds have supported the Jewish Federation of Greater New Orleans, its constituent agencies, and a broad range of Jewish organizations. This would not have been possible without the ongoing generous support of our donors.

DONORS >

We are grateful for JEF's Board of Directors and professional advisors whose guidance, knowledge, and commitment have helped us achieve this growth. We welcome these continued and growing relationships with our donors, their families, and professional advisors, as we work to sustain and secure our community's future.

As you read through this annual report, you will see many ways you can make a difference. Whether establishing a donor advised fund in your family's name that will positively impact our community, now and forever, or a designated fund for an organization that is important to you, we can help you on your philanthropic journey.

Looking forward, we are enthusiastic about building our community's resources today to ensure stronger generations tomorrow.

Gogby

R. Justin (Bobby) Garon Lawrence M. Lehmann **Executive Director**

Board President, 2019-2020

TEACHING PHILANTHROPY >

ROBBIE AND DAVID RUBIN, SARAH AND ALEXANDER "SANDY" COHEN

Robbie Rubin was raised in Helena, Arkansas, and David in Baton Rouge. Their parents were very active in both communities and great role models for them, particularly instilling the joy in charitable endeavors. Robbie and David hoped to emulate their parents' generosity of giving, through both their time and resources – and that has been successfully passed down to their children.

When their older daughter Sarah met her husband Sandy Cohen, they were both already very generous in their philanthropic activities. So when Sandy, a CPA, learned about the Cahn-Tolmas Donor Advised Fund Incentive and opened a fund at JEF, Sarah's parents quickly followed suit.

They all feel fortunate to be able to continue this tradition together. Through JEF, both families have been making donations to their favorite organizations and causes, and helping meet the greatest needs in their local communities and beyond. The art of giving is one of the great Jewish traditions, and Robbie and David are proud to have continued that tradition from generation to generation, *l'dor v'dor*.

SUSAN AND HOWARD GREEN

and staff would embrace their vision of an early > Susan and Howard Green have always been childhood education program with the Green involved in charitable work. In 2019, they decided Preschool, and that JEF's administration of their that their highest priority was to help create a funds would ensure JCDS's long-term success nurturing, values-based Jewish education for our with funds available for future needs. While the community after seeing firsthand the impact their Howard and Susan Green Jewish Community grandchildren's Jewish day school in New York had Day School Operating Support Charitable Fund on them. One day, that personal passion became provides for a set amount for operating funds a philanthropic reality when Susan and Howard annually, the Howard and Susan Green Jewish stated their intent out loud and put pen to paper. Community Day School Permanent Charitable "Because the stock market had been good" to them, Fund begins distributions in 2023 based on a they decided not to wait until after their lifetimes conservative spending policy - the true definition to make an impact. They wanted to be involved in of an endowment. the Jewish Community Day School of Greater New Orleans' (JCDS) growth-one that will hopefully The Greens are truly leading by example. They include an expansion to the eighth grade.

Making the largest gift JCDS has received in 15 years, Susan and Howard trusted that the board



The Greens are truly leading by example. They hope that their gift will inspire many students to attend JCDS and their parents to support the school's continued growth.

HONORING

TRADITION

JONAS, BETTY, DAVID AND STUART MEYERS

> During her lifetime, Betty Meyers was passionate about supporting Jewish causes, including through her fund at JEF. She was a dedicated member of JEF's Board of Directors and recipient of its highest honor, the Tzedakah Award, in 2016. Betty, who passed away in 2019, continued to inspire her family with her communal work and commitment to philanthropy by leaving her IRA to JEF in three Donor Advised Funds, one for each of her sons.

Betty wisely left her IRA to JEF which is not subject to income taxes on these assets. Without

the tax burden, her three sons were able to receive the entire amount which they can now use for their own charitable distributions over time.

Although David, Jonas, and Stuart do not live in New Orleans, they demonstrated kavod, a Hebrew word meaning honor and respect, and chose JEF as steward to continue their mother's philanthropy. All three intend to recommend grants to some of the same nonprofits that their mother supported because "that's what Mom would want us to do."

SUPPORTING GENEROSITY

WHERE OUR FUNDS GO

\$140,000 TOTAL GRANTS AWARDED from JEF's General (Unrestricted) Funds in 2019



Grants from the General Fund and Board Designated Unrestricted Funds support organizations that benefit our entire community, including the Jewish Community Center, Jewish Family Service of Greater New Orleans, the Jewish Community Day School of Greater New Orleans, Tulane Hillel, and other organizations and projects of interest to our Jewish community. Avodah: The Jewish Service Corps (NO) General Support

BBYO Camp Grants

Camp Barney Medintz Camp Grants

Camp Ramah Darom General Support

JDC Disaster Response Hurricane Dorian Relief

New Orleans Jewish Community Center/Goldring-Woldenberg Jewish Community Center Community Chanukah Concert and Dinner Holocaust Memorial Program/Israel Independence Day Jewish Holiday Luncheons Senior Exercise Program Summer Day Camp Shlichim

Jewish Community Day School of Greater New Orleans School Counselor

Jewish Family Service of Greater New Orleans Financial Resource Center Intensive Case Management Services Passover Food Basket Victor Center for Genetic Testing Event

Jewish Family Service





Jewish Federation of Greater New Orleans Amiel BaKehila Jewish Newcomers Program JNEXT Jewish Pride NOLA Resetting the Table

Le Petit Théâtre du Vieux Carré The Pianist of Willesden Lane

Moishe House New Orleans General Support

National Council of Jewish Women Greater New Orleans Section General Support **Tulane Hillel** Shabbat Dinner on Campus Tulane Jewish Leaders

URJ Henry S. Jacobs Camp Camp Grants

WWNO Chanukah Programming Sponsorship

WYES Holocaust Programming Sponsorship

GOLDRING JEWISH SUMMER CAMP EXPERIENCE

The Jewish Summer Camp Experience, funded by the Goldring Family Foundation and administered by JEF, provides one-time-only grants of up to \$1,500 to help families send their children to nonprofit Jewish sleepaway camps. Children in grades one through nine who reside in Louisiana, Alabama, Mississippi, and the Florida Panhandle are eligible to apply. In 2019, 75 children were each awarded grants to attend 12 different camps.

Established by JEF in 1999 and funded by the Goldring Family Foundation since 2001, the Goldring Jewish Summer Camp Experience has distributed grants for more than 1,519 children to attend Jewish summer camp since the program's introduction. One of the most effective ways to create positive Jewish identity and develop children's commitment to living Jewish lives is to expose them to a camp experience, where they will meet other Jewish children and appreciate the precious heritage of Jewish traditions while enjoying fun activities in a classic Jewish summer camp culture.

For more information, please call Debbie Berins at 504-524-4559 or email debbie@jefno.org.



2019 CAMPERS

Tabor Abeles Reese Adler Henry (Max) Alterman David Dean Bain Jackson Becker Carly Berger Gavyn Capilouto Éden Clark Eli Clark Micah Clark Adelyn Cohen Alexis Cohen Madeline Jaye Cyphers Rebecca June Cyphers Max Densen William Hayes Dyer-Smith Morris Eckstein Lillian Elichman Ron Eyal Yoav Eyal Jared Fantle Charles Finger Adira T. Friedman Sophia Garren Layla Rose Goldis Julia Gordon Kaylyn Gross Valerie Green Alyssa Hecht Benjamin Hill Reid Hugunine Rowan Hutchison Emma Lena Jaffe Sienna Kansas Joshua Karlitz Clyde Matthew Kaufman Daniel Katz Celia (Lee) Kiefer

Rafaela Kosoff Zoe Belle Levine Anna Mae Lindy Addy Lichtstein Caroline Lichtstein Liam McCaughey Owen McCaughey Samantha McCaughey Thomas McGregor Macey Laine Mirowitz Alexander Murov Natalya Murov Alexa Nelson Morgan Nelson Elijah Nierman Samuel Orlansky Robert (Liam) Petroff Abby Claire Pollack Jackson Arthur Radon Gabriel Recile Abram Lee Reiss Chana Rivkin Hinda Rivkin Mordechai Rivkin Rivka Rivkin Isaac Rothman Keeton Smith Owen Smet Evy Rose Stroderd Chloe Stein Olive Terk Thea Teague Laila Thiem Vivian Toye Vigodsky Tristan Williams Aidan Williams Blake Taylor Young

Our donors are our foundation. THANKIYOU \$68.5 million TOTAL ASSETS 555 donor

\$9.8 million TOTAL DONATIONS

for supporting our Jewish community!

\$140,000 GENERAL FUND

\$4.6 million distributed to more than 500 nonprofits



CREATE A JEWISH LEGACY PROGRAM

CREATE A JEWISH LEGACY IS A STRATEGIC AND THOUGHTFUL PHILANTHROPIC PLAN:

- That leaves a charitable legacy that strengthens our Jewish community in your name.
- That honors or remembers people who are important to you.
- That allows successive generations to continue family giving traditions.
- That makes a difference that lasts beyond the here and now.

An endowment fund is the most common way to implement your plan and is typically established through a gift from your estate. Distributions are made annually and may be made in perpetuity to organizations that are important to you. An endowed fund is a powerful tool for you and your favorite charities because your gift will continue giving and your fund will continue to grow.

There may be tax benefits that can be achieved during your lifetime or for your estate. We encourage you to discuss specific options with your professional advisors.

Since 2009, when Create A Jewish Legacy was launched, \$30 million in future gifts have been promised for the Jewish community through the program.

Contact Bobby Garon (bobby@jefno.org) or Patti Lengsfield (patti@jefno.org) at 504-524-4559 for a confidential discussion of your giving options.

CREATE A JEWISH LEGACY DONORS

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 Cathy Bart Jennifer and Jack C. Benjamin Jr. Marjorie and Roger* Bissinger Harry Blumenthal Jr. Juanita and Harold* Bohn Jane Bories Marie and James Cahn Vivian and Richard Cahn Robert* and Lorvnne Cahn Pauline and Leonard* Carp Dr. Deborah Cavalier Dr. Steven Cavalier Dorothy and John* Clemmer Michael Davidson John DeBlois Ann C. Fishman Eleanor* and Albert Fraenkel II Cecele* and Francis L. Fraenkel Diane and Alan Franco Pam and Frank* Friedler Jr. Linda and Richard Friedman 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 Mark and Lisa Heller Susan and William D. Hess Rachelle and Marcus* Hirsch Jack A. Hudson Dr. Harris Hyman III 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 Ruth and Lawrence Kullman Jonathan Lake Dashka Roth Lehmann and Lawrence Lehmann Maline M. Levy Saundra K. Levy Ann and Jon F.* Levens John S. Loeb Anne P. and Richard H.* Lowenburg

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*Deceased

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 Ian Arnof Janet and Eugene Aschaffenburg Jean Avegno Emily Ann and Jack C. Benjamin Peggy and Charles Bennett Joan Seidenbach Berenson and Dr. Gerald S. Berenson Alex Berger Lila and David Bernstein Allan Bissinger Alan V. Bories Elias Bowsky Michel Brener

Betty Jean Barnett Bresler Mr. and Mrs. Meyer Brill RoseMary Rotman Brooks Mildred P. Brown Dr. Richard A. Brunswick Jav L. Buckman Abbe Burd Sam Burd Maurice Burnstein Adele Karp Cahn Morris Campell Rosalie Cohen Marianne and Dr. Isidore Cohn Jr. 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 Margot Strauss Garon and Herbert J. Garon 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 Sandra and Edward M. Heller Harry Herman Ruth Herzog Marks Isaacs Babs and Dr. J.E. Isaacson Dr. Sydney Jacobs Anna and Samuel Kamin Libby and Jack Kaplan Elsie Karesh Ida and Harry Katz Miriam Pailet Katz Sam and Jean Katz Irma Moses Kessler Hilda Klein Robert L. Kohlmann Mildred and I. Jay Krieger Edith Deutsch Lashman Helen and Henry Lasoski Shepard Latter Gabriela Lehmann Razele Midlo Lehmann and René Lehmann Nat and Dr. Will Leon Bruce Levy Ruth E. Levy Harry Liwerant Abe, Jack and Rose Manheim Rose Wainer Mansberg Aaron F. Marcus Allen Marks

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UNRESTRICTED GIVING

These generous donors have made gifts to the JEF General Fund as of December 31, 2019. The categories below represent cumulative gifts since 1967.

^{\$}100,000 OR MORE

Elias Bowsky* Michel Brener* Abbe Burd* Sam Burd* John M. DeBlois Dora Ferber* Dorothy (Dotsy)* and Jack* Fisher Betty A.* and Raymond S.* Fishman Diane and Alan Franco Mr.* and Mrs.* Israel Goldberg Goldring Family Foundation Shirley K.* and Robert B.* Haspel Babette (Babs)* and J.E.* Isaacson Dorothy and Marvin L.* Jacobs Robert L. Kohlmann* Razelle Midlo Lehmann* Sandra Bowsky Mahne* Trust Henrietta Mevers Mattise* Jean and Saul A.* Mintz Family Holley Pavy Dr. Nathan H.* and Bluma* Polmer Andrée* and Sidnev* Rosenblum Oscar* and Mariorie* Tolmas Harold Wainer Helen* and George* Wainer Liselotte L. Weil* Roger D. Weill* Ben Wiener* Carol B. Wise and Family Erna* and Willy* Wolff Helen Weil Young* Ruth Helen Young*

\$50,000 TO \$99,999

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\$25,000 TO \$49,999

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\$1.000 TO \$24.999

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*Deceased

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Blumenthal Print Works Abbe Burd Memorial Sam Burd Memorial Babs and J.E. Isaacson Memorial Robert L. Kohlmann Memorial Helen Mervis Memorial Barney Mintz Memorial Willy and Erna Wolff Memorial for the Benefit of JEF Helen Weil Young Memorial

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CAHN-TOLMAS DONOR ADVISED FUND INCENTIVE

To establish a fund through the Cahn-Tolmas Donor Advised Fund Incentive, you can donate \$4,000 to open the fund and JEF contributes the next \$1,000. Once your Donor Advised Fund has been created, you can begin recommending grants of \$100 or more to your favorite non-profits.

INCENTIVES

- > Realize immediate tax benefits
- Distribute when you choose to nonprofits that are important to you
- > Simplify your charitable giving paperwork
- Support your community

TYPES OF ASSETS

- > Cash
- > Publicly traded securities
- ≻ Real estate*
- Other assets may be considered*

*Assets other than cash or publicly traded securities are subject to JEF's Gift Acceptance Policies.

INVESTMENT OPTIONS

(choice of investment depends upon fund balance)

- Fixed Income Pool Under \$25,000
- Mixed Investment Pool \$25,000 or more (60% equities/40% fixed)
- Selection of Vanguard Funds \$40,000 or more
- > Donor may recommend investments \$100,000 or more

ADMINISTRATIVE FEES AND BALANCE REQUIREMENTS

- > No fee to establish a Donor Advised Fund with JEF
- > Annual Administrative Expense: 1% of the fund balance as of 12/31
- > Minimum fund balance of \$1,000 for at least two years

DONOR FUNDS

These generous donors have established funds as of December 31, 2019.

SUPPORTING FOUNDATIONS

Congregation B'nai Israel Endowment Dr. and Mrs. Isidore Cohn Jr. Holley Pavy DeBlois and John M. DeBlois Ferber Family of Houma Robert B. and Shirley K. Haspel Endowment Fund Jean and Saul A. Mintz Family Singer Family

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Cash & Money Market Funds Mutual Funds U.S. Government Obligations Alternate Investments Certificates of Deposit Corporate Stocks & Bonds Exchange Traded Funds Hedge Funds Israel Bonds Real Estate Investment Trusts Contributions Received from Remainder Trusts Accrued Interest Receivable Other Assets Beneficial Interests in Charitable Trusts Cash Value of Life Insurance **Property & Equipment**

TOTAL ASSETS

LIABILITIES & FUND BALANCES

LIABILITIES:

Accrued Expenses Grants Payable Other Liabilities

Funds Held as Custodian

TOTAL LIABILITIES

FUND BALANCES:

Without Donor Restrictions With Donor Restrictions

TOTAL FUND BALANCES

TOTAL LIABILITIES & NET ASSETS

JEF engaged the services of LaPorte to perform audits of our financial statements for 2018 and 2019. Our procedures are reviewed to ensure that we follow current accounting practices.

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	2019	2018	
	9,893,619	6,388,947	
	17,449,602	13,436,226	
	76,574	488,474	
	167,428	280,093	
	155,337	150,000	
	28,444,441	28,233,627	
	10,265,527	7,297,025	
	3,642	3,520	
	532,000	532,000	
	113,665	138,364	
	112,740	101,143	
	152,713	136,505	
	5,380	7,919	
	658,178	872,390	
	420,033	405,867	
	59,614	62,814	
	\$68,510,493	\$58,534,914	
	\$68,510,493	\$58,534,914	
5	\$68,510,493	\$58,534,914	
5	\$68,510,493	\$58,534,914	
5	\$68,510,493 31,443	\$58,534,914 57,524	
5			
5	31,443	57,524	
5	31,443 84,074	57,524 63,531	
5	31,443 84,074 162,408	57,524 63,531 167,011	
5	31,443 84,074 162,408 10,806,473	57,524 63,531 167,011 9,454,882	
5	31,443 84,074 162,408 10,806,473	57,524 63,531 167,011 9,454,882	
5	31,443 84,074 162,408 10,806,473 \$11,084,398	57,524 63,531 167,011 9,454,882 \$9,742,948	
5	31,443 84,074 162,408 10,806,473 \$11,084,398 11,271,704	57,524 63,531 167,011 9,454,882 \$9,742,948 9,569,918	
5	31,443 84,074 162,408 10,806,473 \$11,084,398 11,271,704 46,154,391	57,524 63,531 167,011 9,454,882 \$9,742,948 9,569,918 39,222,048	

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