Dear Friends,

The welfare of the Jewish community is at the heart of everything we do at the Jewish Endowment Foundation of Louisiana (JEF). It centers us, especially as the world continues living through the coronavirus pandemic. JEF is here to care for the needs of the Jewish community for the long term, to address both the Jewish and non-Jewish philanthropic wishes of our donors, and to put a safety net under our Jewish institutions. JEF is clear and resolved in our work to ensure a strong and vibrant Jewish community in the Greater New Orleans area and throughout Louisiana.

2020 was a year of economic disruption, calls for racial justice, and the continued rise of faith-based crimes. Though we cannot be confident of what the future holds, JEF remains rooted in our commitment to honor the past, support the present, and invest in the future of our Jewish community. This pandemic confirmed JEF’s critical role in helping our community weather a storm and come out intact.

JEF’s assets under management grew by more than $18.1 million to $87.3 million. With more than $14 million in new money—almost double the gifts received in our previous record-setting year—and a very strong market, we experienced the largest increase in any given year in our organization’s history. We are living through an unprecedented moment in time, but what gives us hope is the equally unprecedented commitment of our donors, who opened their hearts and united in their charitable giving. JEF distributed more than $7 million in grants from our donor advised, designated, and custodial funds, as well as our supporting foundations.

To all of our donors, professional advisors, and other partners, and on behalf of our dedicated Board of Directors, thank you for inspiring us with your generosity of spirit and giving, and for joining us in building a strong future for our Jewish community.

Stay safe and well,

Morton H. Katz
Board President, 2021-2022

R. Justin (Bobby) Garon
Executive Director

The reward that is paid for giving charity is directly related to the kindness with which it is given.

RABBI ELEAZAR
Linda and Jack Zoller were always committed to the New Orleans Jewish community, generously giving of their time and resources. Leading by example, they created a model of “joyful obligation” that their children and grandchildren have proudly emulated from an early age. When Linda passed away in 1994, Jack established the Linda Malkin Zoller Designated Fund at JEF to honor his beloved wife while also supporting her passion for women’s education.

Sadly, Jack was one of the first members of our community to succumb to COVID-19 in April 2020. We are grateful that he left part of his IRA to JEF, creating the opportunity for us to remember him alongside Linda. After receiving permission from their four children, the Board of Directors passed a resolution to combine Jack’s bequest with Linda’s fund into the newly established Linda and Jack Zoller Board Designated Fund, which will continue to support women’s initiatives.

Like their parents, David, Gary, Glenn, and Diana agree that the act of giving starts the process of connecting to the community. By leaving a portion of his IRA—a highly taxable asset—to JEF, Jack created a legacy that will continue to make a difference in our community.

RÉNÉ LEHMANN

Réné Lehmann was a beloved and revered member of our community—husband, father, grandfather, great-grandfather, attorney, and community leader. For more than 50 years, he was a good friend of JEF, helping many clients establish charitable gifts in their estate planning. When René passed away in 2020, his final gift to JEF was a bequest to establish a designated fund to continue his annual support for Shir Chadash Conservative Congregation, of which he was a founding member and past president. He leveraged his gift with his IRA and some very old U.S. Savings Bonds that would have been heavily taxed if left to his four children, Allen, Larry, Barbara, and Carolyn.

As a seasoned estate planning attorney, René well understood that savings bonds could be left through his will to a tax-exempt charitable organization but not to individuals. He also knew his entire IRA would also have been subject to income taxes if his children were the only designated beneficiaries, so he left instructions for both the savings bonds and a portion of his IRA to benefit JEF, income tax free.

His personal presence will be missed in New Orleans and across the country, but his fund for Shir Chadash will remind us of René’s legacy for many years to come.
When he joined Tulane Hillel as Executive Director in June 2020, Ron Gubitz was plunged into JEF’s Constituent Agency Annual Block Grant application cycle. He quickly recognized that his agency’s most renowned programs would not exist without the support of JEF and its donors. After learning about the Cahn-Tolmas Donor Advised Fund Incentive and attending a JEF planned giving webinar last year, Ron and his wife Leslie realized that a donor advised fund (DAF) at JEF was within reach—something they had previously assumed was not attainable for their young family. A DAF would allow them to not only make their giving more meaningful, but to honor the promises made in their ketubah: “to establish a home committed to our Jewish heritage, a home filled with wisdom, learning, laughter, tolerance, tzedakah, and compassion like the homes modeled by our parents.”

By managing their philanthropy in a DAF, Leslie and Ron can be more thoughtful about making grant recommendations where they can be most helpful. Most important, they are using the fund to teach daughters Nola Bea and Ruby the value of giving tzedakah, doing mitzvot, and contributing to their community.

In 1982, Bob and Shirley Haspel established the Robert B. and Shirley K. Haspel Endowment Foundation, the very first supporting foundation at JEF. The philanthropic couple chose this particular charitable vehicle rather than a private foundation as it would be recognized as a public charity through its legal affiliation with JEF, allowing them to receive the maximum tax benefits.

After Bob passed away in 2005 and Shirley in 2020, their three sons succeeded them on the family board, continuing the family’s charitable giving. Volunteering alongside their parents, David, Robert, and John understood at a young age how fortunate they were and learned the importance of helping those in need. While both Shirley and Bob made significant impacts during their lifetimes, Shirley translated her profound passion and connection to social causes into a master’s degree in social work, enabling her to make even more of a difference in countless lives. The boys regard both parents as inspirations for their philanthropy, which they consider to be “part of the Haspel DNA,” and have already observed this innate trait in their own children.

Because the brothers continue to make distributions to some of the same organizations that were important to Shirley and Bob, one of their first grants as Board members was to the Jewish Federation of Greater New Orleans to establish Shirley’s Lion of Judah Endowment, converting an ongoing annual gift into a perpetual commitment.
$250,000
TOTAL GRANTS AWARDED
from JEF’s General (Unrestricted) Funds in 2020

These grants from the General Fund and Board Designated
Discretionary 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.

ANSHE SFDARD
Rabbi’s Discretionary Fund: COVID-19 Emergency
Financial Assistance

AVODAH NEW ORLEANS
General Support

CHABAD JEWISH CENTER
Rabbi’s Discretionary Fund: COVID-19 Emergency
Financial Assistance

CHABAD AT TULANE JEWISH STUDENT CENTER
Rabbi’s Discretionary Fund: COVID-19 Emergency
Financial Assistance

CONGREGATION BETH ISRAEL
Rabbi’s Discretionary Fund: COVID-19 Emergency
Financial Assistance

CONGREGATION GATES OF PRAYER
Rabbi’s Discretionary Fund: COVID-19 Emergency
Financial Assistance

HURRICANE LAURA RELIEF FUND
Disaster Relief

JEWISH COMMUNITY DAY SCHOOL
OF GREATER NEW ORLEANS
School Counselor

JEWISH FAMILY SERVICE OF GREATER NEW ORLEANS
COVID-19 Emergency Financial Assistance Program
Financial Resource Center
Intensive Case Management Services

JEWISH FEDERATION OF GREATER NEW ORLEANS
Greater New Orleans Jewish Community Healthcare
Workers Take Home Meal Program
General Programming
Gift of Israel Program
Jewish Newcomers Program

LIMMUDFEST
General Support
For the past 20 years, the Goldring Family Foundation has funded the Jewish Summer Camp Experience, providing one-time-only grants of up to $1,500 to help families send their children to nonprofit Jewish sleepaway camps.

But 2020 was different. The major Jewish summer camps announced that their camps were either not going to operate that summer, or would look dramatically different. Unfortunately, this meant no camp, but also a significant and potentially fatal strain on camp budgets.

The Goldring Family Foundation truly understands that, more than any other institution, camps provide the glue for future Jewish commitments. They also knew what this meant for many hopeful campers from Louisiana, Alabama, Arkansas, Mississippi, and the Florida Panhandle, who were anticipating grant awards and a summer away with their friends. Given the role of sleepaway camp in American Jewish life and the financial impact that came with the cancellation, the Goldring family provided grants to the 15 camps last year’s applicants would have attended to help ensure they could stay afloat and open again in Summer 2021.

The Goldring Jewish Summer Camp Experience has distributed grants for more than 1,520 children to attend Jewish summer camp since the program’s introduction. Multiple studies have shown that kids who participate in overnight summer camps are far more likely to be engaged in Jewish life in college and beyond. Given the role of sleepaway camp in American Jewish life and the financial impact that came with the cancellation, the Goldring family provided grants to the 15 camps last year’s applicants would have attended to help ensure they could stay afloat and open again in Summer 2021.

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Thank you to our donors who united to support our community.

- **$14 million** total donations
- **$7 million** distributed to more than 500 nonprofits

**JEF by the Numbers 2020**

- **$87.3 million** total assets
- **$250,000** general fund grants

- **571** active donor funds
- **16** new donor funds
In the first month of the crisis, the Jewish Community COVID-19 Emergency Financial Assistance Program was launched with guidance from the Jewish Federation of Greater New Orleans, solely funded by JEF and implemented by Jewish Family Service of Greater New Orleans. This program provided vulnerable members of our community with financial aid to relieve economic stress due to the novel coronavirus pandemic. JEF’s Board also approved grants for the Rabbi’s Discretionary Fund at each area synagogue, the Greater New Orleans Jewish Community Healthcare Workers Take-Home Meal Program, and United Way of Southeast Louisiana’s Hospitality Cares Pandemic Response Fund.

This last Passover was different from all others. On behalf of the New Orleans Clergy Council, JEF administered the Kol Dichfin: Come and Eat Fund to support our local food bank that was struggling to keep pace with the increase in food insecurity due to COVID-19. JEF collected almost $53,000 from 200 local families, which was distributed to the Second Harvest Food Bank and matched by Entergy’s “Power of 2” gift campaign.

Just when it seemed that we would weather the storm, another type of storm hit. In an extremely active and record-setting hurricane season, the Lake Charles and Alexandria areas were impacted by Hurricanes Laura and Delta. Again, our community responded swiftly. Along with grants from our donors’ funds, JEF contributed to the Hurricane Laura Relief Fund, providing financial assistance to individual members of those Jewish communities as well as to Lake Charles to repair the extensive damage sustained to their temple.

We could not have imagined or anticipated the plethora of events that would dominate our lives, from the pandemic to major hurricanes, but our community responded with compassion and action.

JEF would like to wish a resounding “Kol HaKavod!” to all those on the ground and the many who went above and beyond during 2020 to ensure continuity of Jewish life and the safety and well-being of our Jewish community.
YOUR IMPACT

STRENGTHENING JEWISH TOMORROWS

Every JEF gift begins with a person or family that wants to make the world a better place.

Connect with the experts at JEF who are uniquely positioned to support Jewish philanthropy in the Greater New Orleans area and Jewish communities across the state. We will discuss your options, your goals, the different types of giving vehicles we offer, and explore how you can make a difference. JEF will work together with your professional advisors to help maximize your philanthropic impact.

Which gift option makes the most sense for you and your family?

Cash Gifts Make an impact today, or set aside money and allow it to grow so you can make a greater impact tomorrow.

IRA Designation/Gift of Retirement Assets Transfer your Required Minimum Distribution (RMD) to JEF. An RMD is mandatory if you are over 72. This is a tax-advantaged gift-tax option, particularly after recent federal tax changes.

Life Insurance Designate JEF as the beneficiary of a current policy, or establish a new policy to benefit one or more organizations.

Bequests Leave a gift to JEF in your will. It is the easiest and most common option for a legacy gift, and it costs you nothing today.

 Marketable Securities Avoid capital gains and provide an immediate charitable deduction based on current market values when you donate stocks, bonds, or other appreciated securities.

Real Estate Gifts Avoid a capital gains tax by donating real estate.

Life Estate Transfer the deed of your home (or vacation property) to JEF, and maintain lifetime use of the property, receive a tax benefit, and make a greater impact.

Closely Held Business Interests Gift your share of LLCs or partnerships and avoid significant capital gains tax.

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Closely Held Business Interests
Gift your share of LLCs or partnerships and avoid significant capital gains tax.

Structure your gift according to your goals: Make a difference today, benefit generations to come, provide tax savings, care for loved ones, and more.

JEF General Fund Support grants for new, innovative programs and emergency needs in our Jewish community.

Restricted Fund Benefit specialized organizations or causes by making distributions at a specified spending rate.

Endowed Fund Ensure support for one or more charitable organizations in perpetuity by creating a spending policy using interest only.

Charitable Remainder Trust Fund this type of trust with a significant asset and receive an immediate tax benefit. Earnings provide income for you/your loved one’s life or a term of years, after which the trust’s remainder assets are left to charity.

Charitable Lead Trust Fund this type of trust with a significant asset. Earnings generated will benefit the charity for a term of years, after which the trust’s assets will be transferred to your family.

Also known as DAFs, donor advised funds are used like charitable checking accounts. DAFs are a great strategy for maximizing income tax deductions after recent federal tax changes.

- Receive an immediate tax benefit.
- Recommend charitable grants throughout the year.
- Name a successor advisor to continue your philanthropy.
- Access funds 24/7 through our online donor portal.

STRENGTHENING JEWISH TOMORROWS

Every JEF gift begins with a person or family that wants to make the world a better place.

Connect with the experts at JEF who are uniquely positioned to support Jewish philanthropy in the Greater New Orleans area and Jewish communities across the state. We will discuss your options, your goals, the different types of giving vehicles we offer, and explore how you can make a difference. JEF will work together with your professional advisors to help maximize your philanthropic impact.

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- Name a successor advisor to continue your philanthropy.
- Access funds 24/7 through our online donor portal.
CREATE A JEWISH LEGACY PROGRAM

Create A Jewish Legacy Is A Strategic Philanthropic Plan:

1. That leaves a charitable legacy, in your name, to create a permanent resource to meet the challenges and needs of our Jewish community.

2. That honors or remembers people who are important to you.

3. That allows successive generations to continue family giving traditions.

A bequest is the easiest and most common option to Create A Jewish Legacy and costs you nothing today. Donor advised funds, IRA designations, and life insurance policies are some of the other effective vehicles you may use now to make a difference in the community’s future.

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, $32 million in future gifts has been promised to our Jewish community.

Contact Bobby Garon (bobby@jefno.org) or Debbie Berins (debbie@jefno.org) at 304-524-4559 to have a confidential conversation about your philanthropic goals.
Cahn-Tolmas Donor Advised Fund Incentive

The Cahn-Tolmas Donor Advised Fund Incentive was established in 2016. With new donors providing a minimum of $4,000, JEF contributes $1,000 to establish a donor advised fund (DAF). By creating an encouraged many potential donors to open funds.

DURING THE PAST FIVE YEARS ENDING DECEMBER 31, 2020, 57 DAFs HAVE BEEN ESTABLISHED THROUGH THIS PROGRAM:

17 have added funds since their initial contribution
10 have added funds multiple times
34 have made grant recommendations from their funds

THE CAHN-TOLMAS DONOR ADVISED FUND INCENTIVE HAS MADE THE FOLLOWING IMPACT:

$4,855,514
Total initial assets under management in donor advised funds opened through the incentive program (not including the $57,000 in incentives)

$1,278,741
Grants distributed from Cahn-Tolmas Incentive DAFs

$3,647,332
Total assets remaining under management in Cahn-Tolmas Incentive DAFs at JEF

DONOR FUNDS
These generous donors have established funds as of December 31, 2020.

Supporting Foundations
Covenant Birah Israel Endowment
Holley Pavy D’bollin and John M. D’bollin
Feinberg Family Foundation
Robert B. and Shirley K. Haspel Endowment Fund
Jean and Saul A. Mintz Family

Donor Advised Funds
Dohena Baylock
Phyllis and Jack Altman
Lisa V. and Cary J. Armin
Anonymous 2008 ART
Arnet Family Charitable
Arnoo Kaurns Family Foundation
Patricia Lattin Barnett
Annie D. Bannon Endowment
Cathy and Morris Bart III
Hartha Bart
Karen Heller and Robert Becker
Beeman Family Charitable
Marc N. Belkin
Emily and Jack C. Benjamin Family
Emma Stoller Benjamin
Jennifer and Jack C. Benjamin Jr.
Benay and Shelly Remson
Allan Bissinger Memorial
Allan and Nancy Bissinger
Marjorie and Roger Bissinger
Bissinger-Timnan for the Benefit of Jewish Family Service
B’hai Maimondes
Jane and Alan Boness
Caroline and Robert Brickman Family
Bubby and Zayde**
Adelle Kapp Cahn
Adelle Karp Cahn Transportation
Vivian and Richard Cahn
Robert and Loraya Cahn Family
Cahn-Tolmas Donor Advised Incentive
Causaway Partners
Chabad at Tulane Shabat Dinner
Chapter Two
Chezstout
Cohen Family
Josephine Bostock and Benjamin Cohen
Jay and Avery Cossens
Joan B. and Gregory Davis
Albert and Peart Daube #1
Albert and Peart Daube #2
Sammie and Ruth Davidson Memorial
Richard and Ina Davis
Jeanine Ellport
Arnie and Susan Fuikow
Ann C. Fishman #1
Ann C. Fishman #2
Mara and Joshua Force
Fenkel Family Foundation of JEF
Fracio Family
Pam and Frank Friedler Jr.
Greg Friedler Fund for Creative Expression
Brian R. Friedman
Richard and Linda Friedman
Friendship
Bobby Garon and Robin Levy Family
Alice Gershman
Garshandy Family
Mike and Sandy Geltter
Mike Geltter JFS Counseling
Courtney Elizabeth Giannoccio Advocacy
Robin M. Giannoccio
Ginko
Alicia Yolen Gitter**
Gittelman
Charles and Cathy Glaser and Family
Laura K. Glaser
Louis and Lilian Glazer Family
Michelle and Jacob Golding
Ashley Martin Golds
Jacqueline Mau Goldberg
Beila Goldman Memorial
Bernard A. and Marjorie F. Goldman Memorial
Carolyn and Jeffrey Good
Peggy and Julian Good
Carol and Louis K. Good Jr.
Susan F. and Louis K. Good III
Charles Grosberg Norma Grosberg
Grant Joseph O. Grant
Kitty and George Greenberg
JoAnn and Dr. Harry Greenberg
Leslie and Ron Gubitz**
Maurice and Harriet Handelman
Harry’s Ace Hardware Charitable
John Haspel and Amy Gumbrecht Haspel
Sandy and Edward Heller
Lisa J. Heller***
Betty and Theo Heller
Albert and Rea Hendler for the Benefit of Jewish Family Service
Barbara Kline Herman Family
Fred and Amanda Herman
Maury A. Herman
Lisa Gurtz Herman and Michael F. Herman
Russ M. Herman Family
William and Susan Hess Social Action
Henry and Janet HeyufdI and
Annette Hirsch
Hunter Family
Inspire Family
Camp Henry S. Jacoba Create A Jewish Legacy
Shekla and Terry Jacobson
JEF Special Fund for Jewish Camping
Jewish Children’s Regional Service
Create A Jewish Legacy
Jewish Endowment Foundation of Louisiana
Tastatah Funders Network
Jewish Family Service Create A Jewish Legacy
Jewish Family Service Financial Assistance
Jewish Family Service Juliane Isacson
Jewish Family Service Lifeline
Jewish Family Service Presidents Circle
Jewish Family Service Teen Suicide Prevention
Jewish Federation of Greater Baton Rouge
JKJ
Andrea S. Joseph
Jay L. Joseph
Hugo Kahn
Lori E. Kahn
Margie A. Kahn
Tom S. Kahn
Larry M. Sanders and Dr. Michael Kaiser
Kalvick
Kanner Family
Kapnisky Family
Carinlyn L. Kawasaki**
Vick B. and Jacob L. Karo Family
Allan L. Katz
Benjamin G. and Miriam Katz
Brian D. and Lisa Katz Family
Mr. and Mrs. Ganon Katz
Keith and Evie Katz
Julien and Larry Katz
Carole and Morton Katz Family
Richard L. Katz
Ronald F. Katz Memorial
Ira Moses Kesseler
Stantley C. and Ellen W. Kesseler
Ann Zitzt Kantz
Joan and Fred King Family Foundation
Kim Wainer Kline
Betty and Ira Kahan
Shari Kombick
Mildred J. and Jay Krieger
Harriet Wanger Kugler Memorial
Ruth and Larry Kulman
Abbe and Jo-Ellen Kupperman
Mara, Stephen, Nancy and Jeffrey Kupperman
Zachary, Shane, Shira, Asher, and Eli Kupperman
Jonny Lake**
Lehmann Family
Alan Lehmann**
Barbara A. Lehmann**
Dashiia Roth Lehmann
Bond and Ashley Longfield
Andrena and Terence Leskoelle
Samuel T. and Garthick K. Levetan
Levy Family
Beverly Marcuse and Lori Kattan Levy Memorial
Bruce Levy Family for the Benefit of Jewish Family Service
Bruce Levy Family for the Benefit of Metairie Park Country Day
Bruce Levy Family for the Benefit of Temple Sinai
Bruce Levy Memorial for the Benefit of the New Orleans Mission
Bruce Levy Memorial for the Benefit of Second Harvesters Food Bank
Bruce Levy Memorial for the Benefit of WWNO Radio
Charles Levy
Jonathan Lermes Levy
Margo Levy for the Benefit of Temple Sinai’s Religious School
Renee and Rusty Levy Family
Saundra A. Levy
Ann L. Leyens
Lumenlend New Orleans
Susan L. Kinsky and Hugh W. Long
Louisiana Community Mikvah
Lowenburg Family
Thomas Lowenburg and Judith Laftta
Social Justice
Jane K. and Henry L. Lowentritt
Bonnie and Arthur Lodge Family
Madderra Family**
David Mann Family
Manshel
Aaron F. Marcus
Frances and Bernard Marcus
New
Carrie and Austin Marks
Marshall-Katz
Sarah and Sanford Maslansky Family
Margarette and Leopold Mendler Charitable No. 1
Margarette and Leopold Mendler Charitable No. 2
Mendler/Lake No. 1
Mendler/Lake No. 2
Meyers Family Trust
Betty and Philip Meyers
David and Christie Myers**
Donald R. Mintz Memorial
Elaine and Ellis Mintz
Linda and Albert Mintz
Melinda and Morris Mintz Family**
Burt and Joel Myers Family
Nathan Family
Carole and Richard Not
Lauren Levy Neustadt
New Orleans Holocaust Memorial
New Orleans Sunrise
NFOSF
NOLA Jewish Women’s Leadership
Donna, William, Viki and Thomas Norman
Nowakley-Rosenberg
The Nudy Foundation
Rickie and Gordon Nutik
Joan S. Weil Oppenheim
Julie Wise Oreck
Naomi and Larry Oransky**
Lew and Sanford Pakiet
Sarah and Joe Pasternack Jr. Family
Herman and Miriam Peasrsky Adult Fellowship
Leon and Debbie Posner
Bill and Lee Potkin Family
Leonard E. Prochovnicz Memorial
Coepe Pulitzer
Joyce and Sidney Pulitzer
Ann and Larry Pacifer
Julie Schwartz and David Raddauer
Cindy and Leon R. Rittenberg Jr. Family
Arlene Robertson
William W. and Eddy K. Rosen
Ralph and Geena Rodeblatt Memorial
for Holocaust Education
Meryl and Alan Rosenbloom
Michelle and Shea Soll
Rose Sher and Jeremy Soss
Bruce Spiter
Mark Stein Family
Judith E. and Susan J. Steinberg
Julie Frinkstein Shraibman
Michael L. Stern
Saul and Sara Stone
Sophia H. Stone
Jon Boedtstra Strauss
Richard and Ann Shiffrin Family
Ellen Kemper and Lee Sucherman Family
Rhoda and Sid Sucherman Memorial Fund
Lisa Tabb
Rian and Teri Tanenbaum Family
Tarr Family**
Congregation Temple Sinai Create A Jewish Legacy
Thomalin
Oscar and Marjorie Tomlin Memorial
Torah Academy Day School
Touro Synagogue Create A Jewish Legacy
Elaine and Bernard Van der Linden
Bruce and Ellie Wainer
Helen and George Wainer
Harold Wainer
Beverly and Lester Wainer #2
Julia and Cedric Walker Family
Wallick Family
Joel Weinstein
Kimberly J. and Gary S. Wiener
Linda B. and Sander N. Wiener
Carol B. Wise
Carol B. Wise HH #1 Exemplar of Excellence Award
Carol B. Wise and Julie Wise Oreck Student Leadership Endowment
Marie K. and Robert R. Wolf
Elen and Mari’ Feitin Family
Fannia K. and Simon L. Yoki
Rose Fay and Michel Ysupchak
Zachor New Orleans
Marilyn Pakiet Zakin
Zinith
Lisa and Gary Zukor
Charles D. Zucker

**New

DISTRIBUTIONS FROM NAMED FUNDS
January 1 through December 31, 2020
Throughout the year, donors made grants totaling $17,039,890 from their donor advised, designated, field of interest, and custodial funds, as well as supporting foundations, to benefit Jewish and secular nonprofits.

Jewish Agencies
- $1,101,276
JFGNO - $1,050,144

Consortium Agencies - $1,873,530

Other Jewish Agencies - $1,261,458
Non-Jewish Agencies - $1,753,482

JEF - N°1
JFGNO - N°2

Consortium Agencies
- $1,873,530

Other Jewish Agencies
- $1,261,458
Non-Jewish Agencies
- $1,753,482

Field of Interest Funds
Richard and Dorothy Cline Memorial Fund for Jewish Education
Ezra Sineser Scholarship for Jewish Education

Custodial Funds
Commemorating Helen School Congregation Gates of Prayer
Congregation Gates of Prayer Endowment
Hilal Foundation of New Orleans
JCC Building #1
JCC Building #2
JCC Fall Family #1
JCC Fall Family #2
Jewish Federation of Greater New Orleans – Gaba
Jewish Federation of Greater New Orleans – Garon
Jewish Federation of Greater New Orleans Centennial Endowment
JFGNO Allocations Endowment
JFGNO Katz-Phillips Endowed Fund
JFGNO Special Purpose Fund
Le Petit Théâtre du Vieux Carré Endowment
National Council of Jewish Women Greater New Orleans Section Endowment
NCJW Irma Isackson Scholarship
Alan Rosenblum Jewish Community Center Endowment
Milton Rosenzweig Jewish Federation of Greater New Orleans
Touro Synagogue Clergy Compensation
Touro Synagogue Hungary
Touro Synagogue Operating Reserves
Touro Synagogue Shabbat Dinner
Touro Synagogue Student Housing Endowment
Charles Zucker (JFGNO)

B’nai Maimonides Funds
Deborah Lindsey Aminan
Jennifer Sarah Bart
Michael A. Bascham
Jack C. Benjamin III
Art Berk
Julian Nathanial Box
Adam Bresler
Rachel S. Bresler
Anna F. Brickman
Jacob K. Brickman

**New
### Lion of Judah Endowments

- Carol Asher
- Cathy Bart
- Marjorie Bissinger
- Vivian Cahn
- Feffer Family of Houma/Dora Feffer*
- Ann C. Fishman
- Margot S. Garon*
- Carol Grant
- Byrd Berenson Haspel*
- Shirley K. Haspel*
- Lisa J. Heller
- Sandra P. Heller*
- Batelle S. (SALLY) Isaacson*
- Tamara Jacobson
- Lisa Kahn
- Carol Katz
- Lisa Katz
- Anna P. Lowenberg
- Tamara B. Meyer*
- Lois Meyer*
- Julie Grant Meyer
- Betty S. Meyer*
- Julie Wise Oreck
- Joyce S. Pullman
- Karen Z. Sch*
- Teil Tenenbaum
- Nancy Bissinger Timmo
- Anna G. Ulery*
- Patricia C. Ungar
- Beverly Wainer
- Lynne Wasserman
- Linda B. Wainer
- Carol B. Wise
- Frances S. Wolff

### Perpetual Annual Campaign Endowments

- Dr. Gerlad Berenson*
- Alan Bissinger*
- Morris Campbell*
- R. Justin (Bobby) Garon
- Albert* and Rea* Hendler
- Mark H. Heller
- R. Justin (Bobby) Garon*
- Allan Bissinger*
- Dr. Gerald Berenson*
- Brian Katz
- Brian Katz
- William D. Norman Family
- Morton Katz
- William D. Norman Family
- Alia London Hirsch
- Olivia Singer
- Todd Hamilton
- Amy Singer
- Mark H. Heller
- Reuben A. Hirsch
- Olivia Singer
- Liza Rebecca Gutentag
- Mark H. Heller
- Bette Rachele Solomon
- Alia London Hirsch
- Leo Singer
- Liza Rebecca Gutentag
- Manya-Jean Gitter
- Lylah Jazz Bernstein
- Blake Ziegler
- Michael Wasserman MD
- Edward L. Soll MD
- Joshua Rubenstein
- William D. Norman Family
- Hugo Kahn
- Brian Katz
- Brian Katz
- Lisa Katz
- Lisa Katz
- Babs Isaacson*
- Lisa J. Heller
- Shirly K. Haspel*
- Byrde Berenson Haspel*
- Margot S. Garon*
- Ann C. Fishman
- Ferber Family of Houma/Dora Feffer*
- Vivian Cahn
- Feffer Family of Houma/Dora Feffer*
- Ann C. Fishman
- Margot S. Garon*
- Carol Grant
- Byrd Berenson Haspel*
- Shirley K. Haspel*
- Lisa J. Heller
- Sandra P. Heller*
- Batelle S. (SALLY) Isaacson*
- Tamara Jacobson
- Lisa Kahn
- Carol Katz
- Lisa Katz
- Anna P. Lowenberg
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- Lois Meyer*
- Julie Grant Meyer
- Betty S. Meyer*
- Julie Wise Oreck
- Joyce S. Pullman
- Karen Z. Sch*
- Teil Tenenbaum
- Nancy Bissinger Timmo
- Anna G. Ulery*
- Patricia C. Ungar
- Beverly Wainer
- Lynne Wasserman
- Linda B. Wainer
- Carol B. Wise
- Frances S. Wolff
- Blake Ziegler
- Kyla A. Yager
- Margaret Willis
- Jamie Tafer
- Kyia A. Tafer
- Rebecca Zerlin
- Blake Ziegler

### Young Philanthropist Funds

- Blake Ethan Amair
- Michelle Bart
- Karen Berenstein
- Lyleh Jazz Bernstein
- Marya-Jean Gitter
- Lisa Rebecca Gertfag
- Alle London Hirsch
- Eden Diegus Hirsch
- Ernest Ziegling Hirsch
- Les Adler Hirsch
- Madeline C. Hirsch
- Olivia Sarah Hirsch
- Reuben A. Hirsch
- Clotie Dikt Lyon
- Gideon Lyon
- Sydney Laenen Mimeses
- Jordan Saunders Moses
- Max Gustave Moses
- Samuel Teifer Moses
- Zoe Wise Oreck
- Jaki E. Susan
- Logan Jacob Susan
- Lia Grace Toporek
- Mason Samuel Toporek
- Delphine Duram Tricoliar
- Lucienne Estelle Tricoliar
- Courtney Werner
- Joshua Wainer
- Benjamin Wilkins
- Jonathan Wilkins
- Zachary Wilkins
- Charles Wilkins
- Daniel Jacob Wise

### Trusts

- Robert and Lynne Cahn Family
- Friedman Family
- Hamilt and Maurice Handelman
- Sandra P. Heller
- Ann and Jon F. Leyers
- Fixel and Dave Meltzer
- Melinda and Morris Mintz
- Marilyn Keifer Rosenson

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## Financial Statement

### Assets

<table>
<thead>
<tr>
<th></th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; Marketable Funds</td>
<td>$7,327,083</td>
<td>$9,893,619</td>
</tr>
<tr>
<td>Mutual Funds</td>
<td>$20,750,079</td>
<td>$17,449,602</td>
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<tr>
<td>U.S. Government Obligations</td>
<td>$648,128</td>
<td>$76,574</td>
</tr>
<tr>
<td>Alternative Investments</td>
<td>$113,114</td>
<td>$167,428</td>
</tr>
<tr>
<td>Certificates of Deposit</td>
<td>–</td>
<td>$155,337</td>
</tr>
<tr>
<td>Corporate Stocks &amp; Bonds</td>
<td>$36,324,554</td>
<td>$28,444,441</td>
</tr>
<tr>
<td>Exchange Traded Funds</td>
<td>$15,327,863</td>
<td>$10,265,527</td>
</tr>
<tr>
<td>Hedge Funds</td>
<td>–</td>
<td>$3,642</td>
</tr>
<tr>
<td>Israel Bonds</td>
<td>$506,240</td>
<td>$532,000</td>
</tr>
<tr>
<td>Real Estate Investment Trusts</td>
<td>$101,239</td>
<td>$113,665</td>
</tr>
<tr>
<td>Contributions Received from Remainder Trusts</td>
<td>$124,478</td>
<td>$112,740</td>
</tr>
<tr>
<td>Accrued Interest Receivable</td>
<td>$127,522</td>
<td>$152,713</td>
</tr>
<tr>
<td>Other Assets</td>
<td>$6,244</td>
<td>$5,380</td>
</tr>
<tr>
<td>Beneficial Interests in Charitable Trusts</td>
<td>$5,477,522</td>
<td>$658,178</td>
</tr>
<tr>
<td>Cash Value of Life Insurance</td>
<td>$441,046</td>
<td>$420,033</td>
</tr>
<tr>
<td>Property &amp; Equipment</td>
<td>$10,717</td>
<td>$59,614</td>
</tr>
</tbody>
</table>

**Total Assets:** $87,285,829

**Total Liabilities & Net Assets:** $68,510,493
OFFICERS
Morton H. Katz, President
Alan Franco, Executive Vice President
Robert B. Brickman, Vice President
Mark S. Stein, Vice President
Jill Israel, Treasurer
Dana Shepard, Secretary
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Roswell J. Weil*
Linda B. Wiener
Carol B. Wise
Ellen S. Yellin
* Deceased

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Ellie Wainer

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Joshua Force, Chair, Jewish Federation of Greater New Orleans
Arnie D. Fialkow, CEO, Jewish Federation of Greater New Orleans

STAFF
R. Justin (Bobby) Garon, Executive Director
Debbie Barins, Legacy Director
Doris Gauthier, CPA, Controller
Alisha Goodlow, Staff Accountant
Nora Wyatt, Funds Administrator/Donor Relations Manager

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

WE REMEMBER...
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 lives 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.

Dorlene Alaynick
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Fran Mendler Lake
René Lehmann
Gertrude Levitan
Andrea Madderra
Marshall Oreck
Marilyn K. Rosenson
Karen Zuckerman Soll
Jack S. Zoller MD

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

- TALMUD TA‘ANIT 23A