

JEWISH ENDOWMENT FOUNDATION BY THE NUMBERS 2022

\$92 MILLION \$15.3 TOTAL ASSETS UNDER MANAGEMENT

\$295,000

GENERAL FUND GRANTS AWARDED

MILLION TOTAL DONATIONS

\$7 MILLION DISTRIBUTED TO MORE THAN 540 NONPROFITS

288 DONOR Advised FUNDS

110**DESIGNATED FUNDS**



DEAR FRIENDS,

As a lasting and compassionate partner in philanthropy, the Jewish Endowment Foundation of Louisiana (JEF) invests in our Jewish community-for today and tomorrow. As is written in the Talmud, As our ancestors planted for us, so do we plant for future generations. We are currently in the unique position of being able to both enjoy the shade from those who planted trees before us and, at the same time, plant seeds from which future generations will benefit. We welcome everyone who aspires to build upon the contributions of the past and present to shape our community's shared future.

After several years of continuous growth, JEF's most recent fiscal year ended with mixed results. While unfavorable market conditions led, in part, to lower total assets, we were once again encouraged by the incredible generosity of our fundholders. Although we shared the details of Dorlene Alaynick's posthumous gift in last year's report, it deserves another mention as we received more than \$6 million from her estate in 2022. With assets under management totaling \$92 million at year-end, what is clear is that the Greater New Orleans Jewish community's generous culture of philanthropy continues to make this a special place.

Despite the downturn, JEF distributed more than \$7 million in grants from our donor advised, designated, and custodial funds, as well as supporting foundations. Our unrestricted grants supported Jews in need from Ukraine to Florida to Colorado; sponsored Holocaust programs to commemorate the past and camp programs to uplift the future; and continued funding the local Jewish institutions that sustain our community.

While JEF has always been committed to collaborative relationships with the individuals and organizations that are the heartbeat of our community, this year we embarked on a \$5 million campaign to create and build permanent endowments for the Jewish Federation of Greater New Orleans (JFGNO) and its constituent agencies: Jewish Community Center (JCC), Jewish Community Day School (JCDS), Jewish Family Service (JFS), and Tulane Hillel. The Today, Tomorrow, Together: United for Our Future campaign offers donors a chance to build a strong and thriving future for all! We are so proud of this initiative that unites our community for one common goal.

Thank you to those who have long supported and partnered with JEF. You have helped us achieve our mission to ensure a secure future and an enduring legacy by serving as an essential resource for Jewish and non-Jewish philanthropy. We are extremely proud of every person, agency, institution, program, and event that brings us together, so that our community can continue to thrive, no matter the challenges that lie ahead of us. We welcome you to celebrate the philanthropy that unites us as a community.

Alan Franco Board President, 2023-2024

R. Justin (Bobby) Garon **Executive Director**

OUR AGENCY ENDOWMENT CAMPAIGN TODAY, TOMORROW, TOGETHER: UNITED FOR OUR FUTURE

JEF is living up to our mission and laying the groundwork for success—forever—for the entire Greater New Orleans Jewish community. We know that the majority of funds raised annually for the immediate needs of agencies and synagogues are applied to the here and now—the present. But the present soon becomes the future. We also know that creating true endowment funds will help to ensure permanent financial resources for our local Jewish community organizations, increasing their ability to thrive not only today, but for generations to come.

In 2022, we silently launched *Today, Tomorrow, Together: United for Our Future*, a \$5 million community-wide, endowment-building campaign to benefit the Jewish Federation of Greater New Orleans and its constituent agencies: Jewish Community Center, Jewish Community Day School, Jewish Family Service, and Tulane Hillel.

With the backing of three very generous, anonymous donors who truly believe in JEF's mission, we are offering a 2:1 match—for every \$2 you give, JEF will match \$1—to inspire our donors to give generously to support the long-term future of the organizations you love. These donors have promised to match all gifts until we reach our goal!

We are so thankful for our community members who continue to entrust JEF with their charitable dollars. Please help us max out the match for our campaign and continue the steady growth of these endowments that will exist in perpetuity.



2





Through their estate planning, they channeled their ongoing commitment to their favorite organizations by establishing three designated funds to benefit JCDS, JFGNO, and Shir Chadash.

Lis and Hugo Kahn

For Lis and Hugo Kahn, investing in our community has been an obvious way of life. Though neither are native New Orleanians, they quickly became integral members of our local Jewish community. Between them, Lis and Hugo have served as lay leaders with many organizations each taking a turn as president of JCDS and Shir Chadash Conservative Congregation, as well as chair of JFGNO's annual campaign.

Together, their more than 30-year philanthropic journey has helped define the type of world they would like to live in, and what they desire for the next generations. Lis and Hugo know they can immediately recommend grants for pressing issues from their donor advised fund at JEF. Through their estate planning, they have channeled their ongoing commitment to their favorite organizations by establishing three designated funds to benefit JCDS, JFGNO, and Shir Chadash. While they cannot imagine what unmet needs there will be years from now, these funds are a seamless and strategic way to distribute their charitable dollars long after their lifetimes.

The couple continues to set the highest standards of philanthropy for their family and all those around them. Lis and Hugo have spent a lifetime committed to improving the community; their legacy gift will benefit the community for years to come.

Dashka Roth and Larry Lehmann

Dashka Roth and Larry Lehmann project a sense of joy and enthusiasm for helping others. For them, *tzedakah* is woven into their DNA. Their drive is a simple yet profound love and commitment for the work of the agencies in our Jewish community that have unconditionally welcomed and sustained so many families throughout the years. Dashka and Larry set a stellar example for generations to come through their heartfelt appreciation and dedication to our community. Whether giving their time or financial resources, the couple is committed to *tikkun olam*. Dashka, a noted jewelry designer, has been actively involved with JCDS since its early years as a board member and even serving as its president. A leading estate planning attorney, Larry is a past president of JEF, Tulane Hillel, and Jewish Children's Regional Service and has served on other boards too numerous to list.

Dashka and Larry were thrilled to learn that JEF's Agency Endowment Campaign created endowment funds for JFGNO and its four constituent agencies, making their legacy giving easier. By donating a life insurance policy with a significant cash value, they took advantage of the match that increased their total gift by fifty percent, and even benefited from a tax deduction. They know that for generations to come this gift will continue to support the Jewish institutions that are so important to Jewish life.

By donating a life insurance policy with a significant cash value, they took advantage of the match that increased their total gift by fifty percent, and even benefited from a tax deduction.







Giving through their funds has been a wonderful way for Sarah and Joe to connect to the community and make a difference.

SARAH AND JOE LUSTIG

Sarah and Joe Lustig learned about philanthropy at an early age through their parents, Bonnie and Arthur. In addition to their family tzedakah box, they also contributed weekly to their religious school classes' giving circles. As Joe approached bar mitzvah age, Bonnie and Arthur decided to celebrate the event by establishing a youth philanthropy fund at JEF-before the B'nai Maimonides program even existed. Sarah followed the same path and, with the initial funds gifted by their Zaydee, both also contributed a portion of their bar and bat mitzvah gifts.

Beyond the services and parties, Sarah and Joe's funds defined an important rite of passage and formal introduction to Jewish philanthropy. Every year on their shared bar/bat mitzvah anniversary, the siblings discussed their grantmaking and causes they were passionate about. As teenagers, Sarah and Joe were lucky enough to see firsthand the impact of some of their charitable giving when visiting Sderot, Israel (less than one mile from Gaza), where the Jewish National Fund built a secure indoor playground and community center, creating some normalcy for children living under threat of attack.

Giving through their funds has been a wonderful way for Sarah and Joe to connect to the community and make a difference. Having recently transitioned their youth funds into true donor advised funds at JEF, both intend to use this next step in their philanthropic journeys to revisit their giving practices, doing their part to help improve the Jewish community and the world.





Tzedakah Award: Joyce and Sidney Pulitzer

4 HOOWMEN ATION EST nual even

LEWISH

JEF's 2022 Annual Event marked a welcome return to in-person gatherings after a pandemic-induced pause. Taking the appropriate precautions, we were delighted to fill the Jerome S. Glaser Audubon Tea Room with smiles on April 24. After two years, it was so special to come together to celebrate four extraordinary members of our community.



Young Family Award for Professional Excellence: Charles A. (Rusty) Levy III



Helen A. Mervis Jewish **Community Professional** Award: Caitrin Gladow

\$295,000 Total grants awarded



9

These grants are made possible because of our supporters who are unified in understanding that, by entrusting your charitable funds with JEF, you are investing in programs that directly support our community. Grants from the General Fund and Board Designated Discretionary Funds help to address the most pressing needs and promising opportunities that benefit the entire Greater New Orleans Jewish community, including the constituent agencies of the Jewish Federation of Greater New Orleans: Jewish Community Center, Jewish Family Service of Greater New Orleans, Jewish Community Day School of Greater New Orleans, and Tulane Hillel.

\$295,000 TOTAL GRANTS AWARDED FROM

JEF'S GENERAL (Unrestricted) FUNDS IN 2022

JEWISH Community Day School

American Jewish Press Association 2022 Annual Conference Sponsorship

Anti-Defamation League South Central Region Summer Educator's Conference

Avodah: The Jewish Service Corps (New Orleans) Ruach Avodah

JEWISHColorado Boulder Fire Relief Fund

Jewish Community Day School of Greater New Orleans ISAS Accreditation Visit Memphis Civil Rights Trip Sukkot Second Line Family Cookout

Jewish Family Service of Greater New Orleans Financial Resource Center Intensive Case Management Services

Jewish Federation of Greater New Orleans Community Security Director Shoresh Institute: Israel's National Challenges Unpacked Program Sponsorship Ukraine Awareness Event Sponsorship Yom Ha'atzmaut Reception at Governor's Mansion Sponsorship

Jewish Federations of North America Hurricane Ian Relief Fund Ukraine Crisis Relief Fund

Louisiana Philharmonic Orchestra Violins of Hope Concerts

Loyola University New Orleans In the Classroom with Anne Frank

TULANE

HILLEL

JEWISH FAMILY SERVICE

10

JEWISH COMMUNITY CENTER

> Moishe House New Orleans General Support

Moscow Nights Oleksandra Basko's "A Non-Fictional War"

Museum of the Southern Jewish Experience Ner Tamid Donation

National Council of Jewish Women Greater New Orleans Chapter General Support

National WWII Museum Violins of Hope Exhibit

New Orleans Jewish Community Center/ Goldring-Woldenberg Jewish Community Center Jewish Holiday Luncheons Senior Exercise Program Senior Transportation Program Southern Fried Chanukah Celebration Summer Day Camp Jewish Cultural Experience

Tulane Hillel Shabbat Dinners on Campus Tulane Jewish Leaders Program

URJ Henry S. Jacobs Camp Camp Grants Jacobs Magic Fund/Staff Recruitment Plan

WYES "The U.S. and the Holocaust" Program Sponsorship



SUMMER CAMP

Dethe family of mr. & mr. & mr. & Brooks, We write this note with Our deepest gesteride. My three belied children are able to attend camp with the help of scholarships. Baing addets provide them with a "camp life genish" second home ja place when they feel song, lived, supported, and encouraged means so very much to me. Thomk you for giving so generally

ballyco. deepert gattinde and

GRANTS

Goldring Jewish Summer Camp Experience RoseMary and Saul Brooks Fund for Jewish Youth Engagement

Jewish summer camps are where kids and teens have fun, make new friends, and immerse themselves in Jewish life. The impact of Jewish camp is immediate—campers return home connected to a community and friends that will last them a lifetime. Whether they are first-time campers funded through the **Goldring Jewish Summer Camp Experience** or campers from small Louisiana communities supported by the **RoseMary and Saul Brooks Fund for Jewish Youth Engagement**, these families understand that today's campers can become tomorrow's Jewish leaders.

Children taking advantage of these two incentive programs may choose the experience that best fits their needs at a camp that highlights nature, the arts, sports, or a multicultural experience—as long as it is a Jewish nonprofit sleepaway camp.

Last summer, 99 campers attended 10 Jewish sleepaway camps for their very first time with the help of the Goldring grant. The Brooks incentive grant helped six campers attend two camps.

JEF is proud to administer these grants year after year, inspiring new campers to fall in love with Jewish sleepaway camp.

Goldring family foundation, thank you so much for helpping me to go to HSJ. I had the Best time, these are some OF mx fourote things. thanks, WIII





As we continue to navigate through a post-pandemic world, as well as a critical nationwide dialogue on ending systemic racism and antisemitism, we are gratefully aware that any progress we make in our mission—now and in the future will only be furthered by our dedicated donors.

Fueled by your generosity, our community answered calls for aid across the world. When **Hurricanes Ida and Ian** hit, a range of critical needs arose that threatened the health and well-being of thousands of individuals, especially those most vulnerable. When Russia brutally invaded Ukraine, threatening the lives of 200,000 Jews, your generous donations to **JFNA's Ukraine Crisis Relief Fund** enabled its partners on the ground to provide urgent relocation and relief services, including *aliyah* to Israel, for thousands of individuals.

Together, we helped to create opportunities for conversations among our youth about hatred and racism through **Loyola University New Orleans' In the Classroom with Anne Frank program**.

IT IS YOUR SUPPORT THAT UNITES OUR COMMUNITY.

We remembered the Holocaust, bringing people of all faiths and backgrounds together to celebrate the victory of the human spirit over evil and hatred, through funding to the National WWII Museum and Louisiana Philharmonic Orchestra for the moving **Violins of Hope exhibit and concerts**.

Because of you, JEF is able to continue funding the local **Jewish** agencies and institutions that unite our community with grants from our General Fund and Unrestricted Board Designated Funds. Thanks to you, we know our "rainy-day" fund will keep us healthy and safe in both good and difficult times, just as it always has.

Fifty-six years ago, early leaders first organized the Community Endowment Foundation of the Jewish Welfare Federation of New Orleans, hoping it would be a lifeline for our Jewish community. They believed that our small and mighty community had the vision and the confidence to build a reliable pool of endowment funds that would one day help ensure our community's financial strength—and vibrancy—for generations to come. Today and tomorrow, JEF is as important to the welfare of our community as it ever was.



LEAVE YOUR LEGACY

LEAVING YOUR CHARITABLE LEGACY:

Creates a permanent resource to meet the challenges and needs of our Jewish community.

Honors or remembers people who are important to you.

Allows successive generations to continue family giving traditions.

We are here to help you leave a lasting legacy (a gift after your lifetime) for the New Orleans Jewish community and the causes you are passionate about. By collaborating with JEF and your estate planning professionals, you can maximize your assets to support the causes most important to you for years to come.

A bequest is the easiest and most common option and costs you nothing today. Donor advised funds, IRA designations, and life insurance are some of the other effective vehicles you may use now to make a difference in the community's future. By including JEF's General Fund in your will, you are contributing directly toward ensuring a secure future for the Jewish community.

Contact Bobby Garon (bobby@jefno.org) or Debbie Berins (debbie@jefno.org) at (504) 524-4559 to have a confidential conversation about your philanthropic goals.

IFGACY DONORS

We are thankful to our donors for their investment in our community. The following individuals, by their generosity during their lifetimes or upon their deaths, have provided lasting legacies for the benefit of our Jewish community, whatever the future may bring.

Jean K. Abbott* Dorlene Alavnick* Miriam F. Alcus* Ian Arnof* Janet* and Eugene* Aschaffenburg Jean Avegno* Cathy Bart Emily Ann* and Jack C.* Benjamin Jennifer and Jack C. Benjamin Jr. Peggv* and Charles* Bennett Gerald S. Berenson MD* Joan Seidenbach Berenson³ Alex Berger* Lila* and David* Bernstein Allan Bissinger* Marjorie and Roger* Bissinger Harry Blumenthal Jr. Juanita* and Harold* Bohn Alan V. Bories* Jane Bories* Elias Bowsky* Michel Brener* Moses 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* Marie and James Cahn Vivian and Richard Cahn Lorvnne* and Robert* Cahn Morris Campell* Pauline and Leonard* Carp Dr. Deborah Cavalier Dr. Steven Cavalier Dorothy and John* Clemmer Rosalie Cohen* Marianne* and Dr. Isidore* Cohn. Ir. Pearl* and Albert* Daube Michael Davidson Sarah Davis*

John M DeBlois Maver L. Dresner* Ruth Dreyfous* Jack Eisenberg* Arthur Feitel* Dora Ferber* Dotsy* and Jack* Fisher Ann C. Fishman Elise Yarrut* and Ralph H. Fishman* Pearl Taul Flaumhaft* Bea and Harold Forgotston* Cecele* and Francis L. Fraenkel Fleanor* and Albert Fraenkel II Diane and Alan Franco Pam and Frank* Friedler Jr. Linda and Richard Friedman Margot Strauss Garon* and Herbert J. Garon* Robin Levy and R. Justin (Bobby) Garon Ana and Dr. Juan Gershanik Irving Gerson* Mr. and Mrs. Israel Goldberg* Jacqueline Mae Goldberg Carl Goldenberg*

Pauline* and Abe* Goldfarb Carol and Louis K.* Good Jr. Fannve* and Alexander* Gottsegen Henry Granet* Maria K.* and Mauriciu A.* Granet Carol Grant Linda Goldman Green Monja Grodsky* Emilie Gruenberg* Louis Gureasko^{*} Anna Levand Haber* Drs. Evelyn* and Shea* Halle Harriet and Maurice* Handelman Byrde Berenson Haspel* Shirlev* and Dr. Robert* Haspel Sandra* and Edward* M. Heller Lisa and Mark Heller Harry Herman* Ruth Herzog* Susan and William D. Hess Rachelle and Marcus* Hirsch Jack A. Hudson* Barbara and Dr. Harris Hyman III Marks Isaacs* Babs* and Dr. J.E.* Isaacson Dotty* and Marvin L. (Buddy)* Jacobs Dr. Sydney Jacobs* Tamara K. Jacobson Mr.* and Mrs. Jay M. Jalenak Lis and Hugo Kahn Anna* and Samuel* Kamin Susan Mintz Kantrow Mr. and Mrs. Brian Kaplan Libby* and Jack* Kaplan Elsie Karesh* Allan L. Katz* Lisa and Brian Katz Mirtala and Gerson* Katz Ida* and Harry* Katz Miriam Pailet Katz* Carole and Morton Katz **Richard Katz** Jean* and Sam Katz* Irma Moses Kessler* Hilda Klein* Robert L. Kohlmann* Betty* and Ira* Kohn Mildred* and I. Jay* Krieger Ruth and Lawrence Kullman Jonathan Lake Edith Deutsch Lashman* Helen* and Henry* Lasoski Shepard Latter* Gabriela Lehmann* Dashka Roth and Lawrence Lehmann Razele* Midlo Lehmann and René* Lehmann Nat* and Dr. Will* Leon Bruce Levy* Maline M. Levy Ruth E. Levy* Saundra K. Levy Ann and Jon F.* Levens Harry Liwerant*

Anne P. and Richard H.* Lowenburg Abe*, Jack*, and Rose* Manheim Rose Wainer Mansberg* Aaron F. Marcus* Frances and Bernard* Marcus Allen Marks* Charles D. Marks Barbara and Sanford Maslansky Tamara* and Peter* Mayer Toby Ginsburg McNamara³ Pearl and Dave Meltzer Doris K.* and Lee H.* Meltzer Toby and Joel A. Mendler Leopold Mendler* Margot Mendler* Helen A. Mervis* Lois* and William* Mexic Hannah Aronson Meyer* Julie Grant Mever Betty S. Meyers* Linda and Albert* Mintz Dorothy* and Bernard D.* Mintz Donald Mintz* Jeannette G. Mintz* Samuel Mintz* Jean and Saul A.* Mintz Virginia Moyse* Dotty* and Max* Nathan Jr. Carole Cukell Neff and Richard Neff Rosalie Bowsky Newman* Mrs. P. Roussel Norman* Doris and William D. Norman Jr. Mrs. William D. Norman Sr.³ Rickie and Dr. Gordon Nutik Lillian* and Sidney* Opotowsky A.B. Oppenheim* Joan S. Weil Oppenheim Julie Wise Oreck Helen* and Dr. Ellis* Pailet Lee* and Sanford Pailet Sarah and Joe* Pasternack Jr. Holley Pavy Nathan Phillips* Bluma* and Dr. Nathan H.* Polmer Mr. and Mrs. M.E. Polson* Leonard Prelutsky* Sandra and Arthur Pulitzer Joyce and Sidney Pulitzer Bettie Redler* Cindy and Leon H.* Rittenberg Jr. Arlene Fink Roberton Drs. Judy and Paul* Roheim Eddy K. and William W. Rosen Edie and Paul Rosenblum Andrée* and Sidney* Rosenblum Marilvn K. Rosenson* Milton Rosenson* Joshua Rubenstein Libbye Singerman Rusakoff* Mr. and Mrs. H.T. Monte Shalett³ Dana and Louis Shepard Simon Shlenker III*

John S. Loeb

Julie and Scott Silbert Esther Sinauer* Mr. and Mrs. A. Louis Sizeler* Irvin S. Smith* Mollye* and William* Smolkin Karen* and Dr. Edward L. Soll Bertha L. Sontheimer* Melba* and Moise* Steeg Elizabeth Steiner* Margery K.* and Charles* Stich Sara* and Saul* Stone Babette Katz Syvert* Sherri and Matthew Tarr Nancy Bissinger Timm Gerson Tolmas* Mariorie* and Oscar* Tolmas Anne G. Uhrv* Edmund J. Ullman* Patricia C. Ungar Cecile* and Dr. Gene* Usdin Elaine* and Bernard Van der Linden Leo Van Os* Helen* and George* Wainer Harold Wainer Beverly* and Lester* Wainer Uriah Wainer* Eileen Wallen Dr. Mollie* and Mervin* Wallick Alberta Wasserman* Lynne and Dr. Michael Wasserman Liselotte Levy Weil* Roswell J. Weil* Martha and Walter Weil III Roger D. Weill* Dr. and Mrs. Carl H. Weinberg* Ben Weiner* Mamie R. Weinstein* Joel Weinstock* John L. Weinstock* Linda B. and Sander N. Wiener Carol B. Wise Richard M. Wise* Frances S.* and Leonard M.* Wolff Erna* and Willv* Wolff Solomon Wolfson* Jeanne* and Morris* Wright Fllen and Marc Yellin Fannie* and Simon* Yokor David B. Young* Helen Weil Young* Ruth Helen Young* Harrel A. Zivitz Linda* and Dr. Jack* Zoller Charles Zucker*

*Deceased **New



Cahn-Tolmas Donor Advised Fund Incentive Program

The Cahn-Tolmas Donor Advised Fund Incentive Program was established in 2016. With new donors providing a minimum of \$4,000, JEF contributes \$1,000 to establish a donor advised fund. By creating a more attainable entry point, this initiative has encouraged many potential donors to open funds.

During the past seven years ending December 31, 2022, 71 DAFs have been established through this program:

have made grant recommendations from their funds

have added funds since their initial contribution

have added funds multiple

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

\$3,695,490

Total initial assets under management in donor advised funds opened through the incentive program (not including the \$71,000 in incentives)

\$**5,324,61**2

Total assets remaining under management in Cahn-Tolmas Incentive DAFs at JEF

^{\$}3,598,275

Grants distributed from Cahn-Tolmas Incentive DAFs

UNRESTRICTED FUNDS

Thanks to the generosity of donors who have established unrestricted funds, JEF can respond quickly and effectively to local community priorities-now and forever.

BOARD DESIGNATED UNRESTRICTED FUNDS

By entrusting JEF's Board of Directors to determine how to allocate these unrestricted funds, donors ensure that their philanthropic vision for a vibrant Jewish community will be in good hands for generations to come.

Blumenthal Print Works Abbe Burd and Sam Burd Memorial Betty A. Fishman and Raymond S. Fishman Memorial Babs and J.E. Isaacson Memorial Robert L. Kohlmann Memorial Helen Mervis Memorial Oscar and Mariorie Tolmas Willy and Erna Wolff Memorial for the Benefit of JEF Helen Weil Young Memorial Linda and Jack Zoller Memorial

CHARITABLE GIFT ANNUITIES

Charitable gift annuities are planned giving arrangements between a donor and a nonprofit organization in which the donor receives a regular payment for life based on the value of assets transferred to the organization. After the donor's death, the assets are retained by the nonprofit organization(s) designated by the donor.

Joyce Ellis* Linda Goldman Green Jack A. Hudson* Maline M. Levy Saundra K. Levy Saundra K. Levy #2

Saundra K. Levy #3 Saundra K. Levy #4 Saundra K. Levy #5 Joel Weinstock*

LIFE INSURANCE

Gifts of life insurance enable donors to provide for a larger legacy tomorrow by making a manageable commitment today. Individuals can establish a fund by assigning an existing policy to JEF, or by purchasing a new policy and naming JEF as its beneficiary. The following individuals have indicated that they are committed to a future gift through a life insurance policy.

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

DONOR FUNDS

These generous donors have established funds as of December 31, 2022.

SUPPORTING FOUNDATIONS

Supporting foundations offer families or businesses a way to strategically invest in philanthropy. Supporting foundations of JEF make annual grant recommendations to benefit charitable, religious, literary, or educational purposes.

Congregation B'nai Israel Endowment 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 Nathan Family Singer Family

DONOR ADVISED FUNDS

Donor advised funds enable fundholders to customize their grantmaking and philanthropic experience. Donors may receive an immediate tax deduction for contributions to their funds and retain the flexibility of how and when to recommend grants to the 501(c)(3) charitable organizations and interests of their choosing. Donor advised funds are the ideal way to engage children in a family's charitable giving.

Dorlene Alaynick Phyllis and Jack Alltmont Lisa V. and Cary J. Amann Anonymous 2008 ART Arnof Family Charitable Arnof Kearns Family Foundation Patricia Latter Barnett Arlene D. Barron Endowment Cathy and Morris Bart III Hertha Bart Karen Heller and Robert Becker Beerman Family Charitable Marc N. Behar Emma Stotter Benjamin Jennifer and Jack C. Benjamin Jr. Jack C. Benjamin III** Benay and Shelly Bernstein Allan Bissinger Memorial Allan and Nancy Bissinger Marjorie and Roger Bissinger Bissinger-Timm fbo Jewish Family Service B'nai Maimonides Jane and Alan Bories Caroline and Robert Brickman Family Melanie and Danny Bronfin Bubby and Zayde Adele Karp Cahn Vivian and Richard Cahn Robert and Lorynne Cahn Family Cahn-Tolmas Donor Advised Incentive Suzanne B. Canalizo z"l Memorial** Causeway Partners Chabad at Tulane Shabbat Dinner Gail and Stuart Chalew Chapter Two Chestnut Cohen Family Josephine Blooston and Benjamin Cohen

Jay and Avery Corenswet Joan B. and Gregory Cox Albert and Pearl Daube #1 Albert and Pearl Daube #2 Sammie and Ruth Davidson Memorial Richard and Ina Davis Jeanne Ellinport Arnold and Susan Fielkow Joshua Lichtman and Davida Finger Ann C. Fishman #1 Ann C. Fishman #2 Mara and Joshua Force Fraenkel Family Foundation of JEF Franco 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 Alex Gershanik Gershanik Family Mike and Marcy Gertler Mike Gertler JFS Counseling Courtney Elizabeth Giarrusso Advocacy Robin M. Giarrusso Ginkgo Alice Yelen Gitter Gitter-Yelen Charles and Cathy Glaser and Family Laurie R. Glaser Louis and Lillian Glazer Family Michelle and Jacob Goehring Ashley Merlin Gold Jacqueline Mae Goldberg Bella Goldman Memorial Bernard A. and Mariorie F. Goldman Memorial Caroline and Jeffrey Good Peggy and Julian Good Carol and Louis K. Good Jr. Susan P. and Louis K. Good III Charles Grosberg-Norma Grosberg Grant-Joseph O. Grant Howard and Susan Green JoAnn and Dr. Harry Greenberg Leslie and Ron Gubitz Maurice and Harriet Handelman Harry's Ace Hardware Charitable John Haspel and Amy Gainsburgh Haspel Sandy and Edward Heller Lisa J. Heller

Betty and Theo Heller Albert and Rea Hendler fbo Jewish Family Service Barbara Kline Herman Family Fred and Amanda Herman Maury A. Herman Lisa Gurk Herman and Michael F. Herman Russ M. Herman Family William and Susan Hess Social Action Henry and Janet Dreyfus/Adler and Annette Hirsch Hunter Family

Inspire Israel Family

Camp Henry S. Jacobs Create A Jewish Legacy Shellie and Terry Jacobson JEF Special Fund for Jewish Camping Jewish Children's Regional Service Create A Jewish Legacy Jewish Endowment Foundation of Louisiana Tzedakah Funders Network Jewish Family Service Create A Jewish Legacy

Jewish Family Service Financial Assistance Jewish Family Service Julanne Isaacson 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 Jav L. Joseph Hugo Kahn Lis and Hugo Kahn Lori E. Kahn Margie A. Kahn Teri S. Kahn Larry M. Sanders and Dr. Michael Kaiser Kali-oka Kanner Family Kaplinsky Family Carolyn L. Karesh Vicki B. and Jacob L. Karno Family Allan L. Katz Benjamin G. and Miriam Pailet Katz Brian D. and Lisa Katz Family Mr. and Mrs. Gerson Katz Keith and Evie Katz JoAnn and Larry Katz Carole and Morton Katz Family Richard L. Katz Ronald F. Katz Memorial Irma Moses Kessler Stanley C. and Ellen W. Kessler Ann Zivitz Kientz Joan and Fred King Family Foundation Kim Wainer Kline Sheri Kornblum Harriet Wainer Kugler Memorial Ruth and Larry Kullman Abe and Jo-Ellyn Kupperman Mara, Stephen, Nancy and Jeffrey Kupperman Zachary, Shane, Jake, Shira, Asher and Eli Kupperman Jonny Lake Allan Lehmann Barbara A. Lehmann Dashka Roth Lehmann Bond and Ashley Lengsfield Andrea and Terrence Lestelle Samuel T. and Gertrude K. Levitan Levy Family Beverly Marcuse and Loris Katten Levy Memorial Bruce Levy Family fbo Jewish Family Service Bruce Levy Family fbo Metairie Park Country Day Bruce Levy Family fbo Temple Sinai Bruce Levy Memorial fbo New Orleans Mission Bruce Levy Memorial fbo Second Harvesters Food Bank Bruce Levy Memorial fbo WWNO Radio Charles Levy Jonathan Lorris Levy Margot Levy fbo Temple Sinai's Religious School Renée and Rusty Levy Family Saundra K. Levy Ann L. Leyens LimmudFest New Orleans Rabbi Bob and Lynn Loewy Susan L. Krinsky and Hugh W. Long Louisiana Community Mikvah Louisiana Legacy** Lowenburg Family Thomas Lowenburg and Judith Lafitte Social Justice Jane K. and Henry L. Lowentritt



Bonnie and Arthur Lustig Family Lyles Family Madderra Family David Mann Family Manshel Aaron F. Marcus Carrie and Austin Marks Marshall-Katzen Barbara and Sanford Maslansky Family Margarete and Leopold Mendler Charitable No. 2 Mendler/Lake No. 1 Mendler/Lake No. 2 Mevers Family Tzedakah David and Christie Meyers Betty and Phillip Meyers Linda and Albert Mintz Donald R. Mintz Memorial Elaine and Ellis Mintz Melinda and Morris Mintz Family Nathan Family Carole and Richard Neff Lauren Levy Neustadter New Orleans Holocaust Memorial New Orleans Sunrise NGCE NOLA Jewish Women's Leadership Doris, William, Viki and Thomas Norman Nowalsky-Rosenberg The Nudy Foundation **Rickie and Gordon Nutik** Julie Wise Oreck Naomi and Larry Orlansky Lee and Sanford Pailet Sarah and Joe Pasternack Jr. Family Herman and Miriam Pesetsky Adult Fellowship Leon and Debbie Pesses Jill and Lee Plotkin Family Copey Pulitzer Joyce and Sidney Pulitzer Ann and Larry Rabin Family **Rippner Family** Cindy and Leon H. Rittenberg Jr. Family William W. and Eddy K. Rosen Ralph and Gertrude Rosenblat Memorial for Holocaust Education Rosenson Family Rubenstein Brothers André and Robbie Rubenstein David and Niki Rubenstein Joshua Rubenstein David and Robbie Rubin Samuels-Bowman Education Jeff Sbisa Claude A. and Mimi Moyse Schlesinger Shackleton Family Dana and Louis Shepard Robert Shepard Ivan Sherman Foundation** Shir Chadash Conservative Congregation Create A Jewish Legacy Shulamit Rymberg Philanthropic Gayle Siegel Julie and Scott Silbert Sizeler Family II Mark and Ruth Skorecki Family Holocaust Memorial Lynn and Charles C. Smith III Ed and Betty Smith Karen and Edward L. Soll

Ellen and Gregg Soll Stacey and Michael Soll Michelle and Shea Soll Rose Sher and Jeremy Soso Bruce Spizer Mark Stein Family Judith B. and Sylvan J. Steinberg Julie Finkelstein Steinhaus Michael L. Stern Sophia H. Stone Jon Besthoff Strauss Richard and Ann Streiffer Family Ellen Kempner and Lee Sucherman Family Rhoda and Sol Sucherman Family Memorial Lisa Tabb Rian and Teri Tanenbaum Family Tarr Family Congregation Temple Sinai Create A Jewish Legacy Thomasina Oscar and Marjorie Tolmas Memorial Torah Academy Day School Touro Synagogue Create A Jewish Legacy Elaine and Bernard Van der Linden Bruce and Ellie Wainer Harold Wainer Marcelle and Joshua Wainer** Beverly and Lester Wainer #2 Julia and Cedric Walker Family Wallick Family Randy Roig and Brian Weimer Joel Weinstock Kimberly I. and Gary S. Wiener Linda B. and Sander N. Wiener Carol B. Wise Carol B. Wise Hillel Exemplar of Excellence Award Carol B. Wise and Julie Wise Oreck Student Leadership Endowment Marie K. and Robert R. Wolf Yavneh Klos** Ellen and Marc Yellin Family Fannie K. and Simon U. Yokor Rose Fav and Michel Yuspeh Zachor New Orleans Marilyn Pailet Zackin Zenith Lisa and Gary Zoller Zoller-Lipsman Family Charles D. Zucker

DESIGNATED FUNDS

Designated Funds ensure that nonprofits receive consistent annual support for critical needs so they can continue their important missions. Disbursements are designated to specific charitable organizations named by the donor when the fund is established.

Dorlene Alaynick fbo Congregation Temple Sinai for Choir and Music Dorlene Alaynick fbo Hadassah New Orleans Chapter Dorlene Alaynick fbo Jewish Endowment Foundation of Louisiana Dorlene Alaynick fbo Jewish Federation of Greater New Orleans Dorlene Alaynick fbo LA SPCA Harold L. and Juanita W. Bohn Mike Brener Jewish Family Service Adele Cahn Catch-A-Cab Morris Campell Federation Endowment Pauline and Leonard Carp Rosalie Cohen Tehiyah Renaissance Covenant House of New Orleans Rita Mary Doll Goldring-Woldenberg Jewish Community Campus Capital Endowment Match Campaign** Elise Yarrut and Ralph H. Fishman Beatrice and Harold Forgotston Ana and Juan Gershanik #3** Maria Kahane Granet and Mauriciu Arnold Granet Howard and Susan Green JCDS Permanent Howard and Susan Green JCDS Temporary Byrde B. Haspel Make-A-Wish Foundation Byrde B. Haspel NCJW Byrde B. Haspel United Way Albert and Rea Hendler Federation Maury Herman #3** Maury A. Herman JFGNO Neil and Albert Hyman Scholarship JCC Endowment** JCDS Endowment** Jewish Family Service II Jewish Federation of Greater New Orleans JFGNO Endowment** JFS Endowment** Hugo Kahn fbo Jewish Federation of Greater New Orleans Hugo Kahn fbo New Orleans Jewish Community Day School Hugo Kahn fbo Shir Chadash Conservative Congregation Janice Weinstein Kahn Endowment IMO Boruch, Chasey, Israel, Henry, Bessie & Isadore Weinstein Lois and Lester Kempner Family Florence "Flossie" Strug Kerner Memorial Luncheon for JCC Seniors Robert L. Kohlmann Senior Citizen Outreach Helen P. and Henry Lasoski Kurt J., Molly S. and Gabriela Lehmann Yahrzeit René Lehmann Shir Chadash Conservative **Congregation Charitable** Harry Liwerant Lowenburg Family Endowment fbo Temple Sinai Anne Pake Lowenburg fbo Springhill Avenue Temple Allen Marks fbo Marks Park at the Jewish Community Center Allen Marks fbo Temple Sinai Dotty Gold Nathan Nathan Family fbo JFS New Americans Holocaust Memorial New Orleans Jewish Day School Scholarship William D. Norman Family

Joe Pasternack Jr. M.E. Polson Provident Aid Edie and Paul Rosenblum Gift of Israel Experience Robbie and André Rubenstein Diane and Mark Schleifstein** Sara Baskind Smith Memorial Karen and Edward L. Soll Tulane Hillel Endowment** Richard L. and Anne G. Uhry Memorial Lectureship for Adult Continuing Education for Shir Chadash Richard L. and Anne G. Uhry Memorial Scholar in Residence Program for Northshore Jewish Congregation Usdin Family Judeo-Christian Lectureship Elaine and Bernard Van der Linden #2 George, Helen, and Harold Wainer** Harold Wainer #5 Eileen Wallen fbo JCRS, Shir Chadash, and JEF Carol Wise Carol B. Wise fbo JEF

RESTRICTED DESIGNATED FUNDS AVAILABLE FOR GRANTS

Restricted designated funds are reserves of money received by JEF to be used for specific purposes or projects designated by the donor. Donor restricted funds provide reassurance to donors that their contributions will be used in a manner they have chosen.

RoseMary and Saul Brooks JEF Special Fund for Jewish Camping Helen P. and Henry Lasoski Nathan and Bluma Polmer Leonard E. Prelutsky Memorial Beverly and Lester Wainer Memorial

FIELD OF INTEREST FUNDS

Field of interest funds distribute income to one or more areas of interest or purpose, as chosen by the donor when the fund is established.

Dorothy and John Clemmer Scholarship for Jewish Youth Esther Sinauer Scholarship for Jewish Education

CUSTODIAL FUNDS

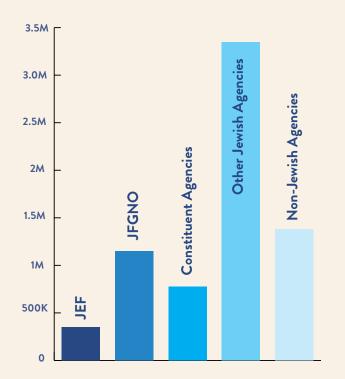
The following organizations have chosen to work with JEF as their trusted partner to steward their assets. Distributions generated from the funds' capital provide these organizations with stable funding to support their programming and operations on a long-term basis.

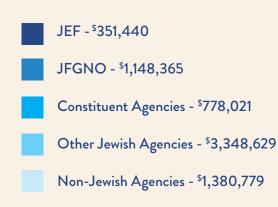
Communal Hebrew School Congregation Gates of Prayer **Congregation Gates of Prayer Endowment** Fielkow-Chase Family Youth Education Initiative Hillel Foundation of New Orleans JCC Building #1 JCC Building #2 JCC Buzzy's Pool Maintenance** JCC COVID Contingency JCC Feil Family #1 JCC Feil Family #2 JCC Nursery School COVID Relief JCC Rainy Day Fund Jewish Family Service of Greater New Orleans 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 Campaign Bequests JFGNO Katz-Philips Endowed JFGNO Special Purposes Le Petit Théâtre du Vieux Carré Endowment National Council of Jewish Women Greater New Orleans Section Endowment NCJW Irma Isaacson Scholarship Alan Rosenbloom Jewish Community Center Endowment Milton Rosenson Jewish Federation of Greater New Orleans Touro Synagogue Clergy Compensation Touro Synagogue Hunger Touro Synagogue Operating Reserves Touro Synagogue Shabbat Dinner Harry and Jeanette Weinberg Endowment Charles Zucker JCDS Charles Zucker JFGNO

DISTRIBUTIONS FROM NAMED FUNDS

January 1 through December 31, 2022

Throughout the year, donors made grants totaling \$7,007,235 from their donor advised, designated, field of interest, and custodial funds, as well as supporting foundations, to benefit Jewish and secular nonprofits.





TRUSTS

Charitable remainder trusts are "split-interest" giving vehicles that enable donors to pursue philanthropic goals while still generating income. They operate by dispensing income to either the trust or one or more named beneficiaries for a specified period of time, after which they donate the remainder of the trust to one or more designated charitable beneficiaries.

Robert* and Lorynne* Cahn Family Friedman Family Harriet* and Maurice* Handelman Sandra P. Heller* Ann and Jon F.* Leyens Pearl and Dave Meltzer Melinda and Morris Mintz

LION OF JUDAH ENDOWMENTS (LOJE)

The women below have endowed their Lion of Judah gifts to the Jewish Federation of Greater New Orleans to provide support when and where it is needed indefinitely.

Dorlene Alaynick* Carol Asher Cathy Bart Marjorie Bissinger Vivian Cahn Ferber Family of Houma/ Dora Ferber* Ann C. Fishman Margot S. Garon* Carol Grant Susan Green Byrde Berenson Haspel* Shirley K. Haspel* Lisa J. Heller Sandra P. Heller* Babette S. (Babs) Isaacson* Tamara Jacobson Lis Kahn Carole Katz Lisa Katz Anne P. Lowenburg Tamara B. Mayer³ Lois Mexic* Julie Grant Meyer Betty S. Meyers* Julie Wise Oreck Joyce S. Pulitzer Marilyn Rosenson* Karen Sher Karen Z. Soll* Teri W. Tanenbaum Nancy Bissinger Timm Anne G. Uhry* Patricia C. Ungar Beverly Smith Wainer* Lynne Wasserman Linda B. Wiener Carol B. Wise Frances S. Wolff

PERPETUAL ANNUAL CAMPAIGN ENDOWMENTS (PACE)

The following donors have endowed their gifts to the Jewish Federation of Greater New Orleans' Annual Campaign to provide perpetual annual support.

Dr. Gerald Berenson* Allan Bissinger* Morris Campell* Beatrice* and Harold* Forgotston R. Justin (Bobby) Garon Maria Kahane* Granet and Mauriciu Arnold* Granet Mark H. Heller Albert* and Rea* Hendler Hugo Kahn Brian Katz Morton Katz William D. Norman Family Milton Rosenson* Joshua Rubenstein Edward L. Soll MD Michael Wasserman MD Charles Zucker*

THE JEWISH FEDERATION OF BATON ROUGE ANNUAL CAMPAIGN ENDOWMENTS

Deborah S. Cavalier Steven J. Cavalier Drs. Judy and Paul* Roheim

Deceased' New**



ASSETS

Cash and Cash Equivalents
Receivables
Interest and Dividends Receivable
Other

Investments

Assets Held in Charitable Trust Beneficial Interests in Charitable Tru Cash Surrender Value of Life Insuranc Other Assets Property & Equipment, Net

TOTAL ASSETS

LIABILITIES & NET ASSETS

LIABILITIES:

Accrued Expenses Grants Payable Liabilities Under Split-Interest Agree Funds Held in Trust (Custodial Fund

TOTAL LIABILITIES

NET ASSETS:

Without Donor Restrictions With Donor Restrictions

TOTAL NET ASSETS

TOTAL LIABILITIES & NET ASSETS

JEF engaged the services of LaPorte CPAs and Business Advisors to perform audits of our financial statements for 2021 and 2022 for which they gave an unqualified opinion. Our procedures are reviewed to ensure that we follow current accounting practices.

	2022	2021
	586,910	132,694
	123,389	104,189
	2,312	13,463
	88,235,518	94,584,189
	93,956	129,695
ots	2,532,815	5,486,526
Policies	534,137	443,847
	3,000	9,294
	6,387	10,639
	\$92,118,424	\$100,914,536
	22,558	38,212
	1,658	84,000
ments	81,210	136,982
)	14,285,597	15,622,367
	\$14,391,023	\$15,881,561
	13,105,275	15,358,912
	64,622,126	69,674,063
	\$77,727,401	\$85,032,975

OFFICERS

Alan Franco, President Robert B. Brickman, Executive Vice President Jill Israel, Vice President Mark S. Stein, Vice President Morris F. Mintz, Treasurer Edward L. Soll MD, Secretary Mara Baumgarten Force, At Large

BOARD OF DIRECTORS

Jessica Bach Jay Corenswet Joan Brooks Cox Sue Daube David A. Dulitz MD Robin M. Giarrusso Cathy S. Glaser Jeffrey P. Good Susan Green John L. Haspel Shellie Jacobson Hirsh Katzen Joshua Lichtman Harry P. Lowenburg Laurence Manshel Austin Marks Sidney C. (Copey) Pulitzer Jr. Leon H. Rittenberg III Dana Shepard Rose S. Sher Ellie Wainer Gary Zoller Max Zwain

PAST PRESIDENTS

Morton H. Katz, Immediate Past President Ian Arnof* Charles Bennett* Richard Cahn Marvin L. Jacobs* Shepard M. Latter* Lawrence M. Lehmann Andrea S. Lestelle Charles A. (Rusty) Levy III 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 Carol B. Wise Ellen S. Yellin *Deceased

EX-OFFICIO

Jonathan (Jonny) Lake, Chair, Jewish Federation of Greater New Orleans Robert French, CEO, Jewish Federation of Greater New Orleans

STAFF

R. Justin (Bobby) Garon, Executive Director Debbie Berins, Assistant Executive Director Kathy Hebert, CPA, Controller Aléshia Goodlow, Staff Accountant Sierra Sager, Board and Grants Manager/Administrative Coordinator Nora Wyatt, Funds Administrator/Donor Relations Manager

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.



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 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.

Richard Buckman Joyce Ellis Harriet Handelman Phyllis Herman Jack Hudson Julanne Isaacson Dorothy "Dotty" Jacobs Allan L. Katz Lillian Opotowsky Carol Rippner Alvin Samuels Joel Wise Weinstock



The Jewish Endowment Foundation of Louisiana ensures a secure future and an enduring legacy by serving as an essential resource for Jewish and non-Jewish philanthropy.



CREATE A JEWISH LEGACY • SECURE A JEWISH FUTURE

ONE GALLERIA BLVD, SUITE 1040, METAIRIE, LA 70001 T (504) 524-4559 | F (504) 524-4259 | JEF@JEFNO.ORG

JEFNO.ORG