

Foundation Families Encourage Giving

Create Donor Advised Funds for the Second Generation

Funds can be established for just \$1,800. The minimum grant is \$100. All giving can be done online through the Foundation's Donor Central web fund access.

Plan Site Visits

Visit programs together as a family or ask your child to visit with a friend and report back. There is no substitute for meeting the people impacted by your support.

Establish Discretionary Funds

Each family member can express their individual philanthropic goals through their family's fund.

Encourage Family Members to Join the Community Youth Foundation

This communal giving experience excites young people about giving and exposes them to community needs.

Hold Regular Family Discussions

Set aside a time to discuss why, where and how your family gives. Ask family members to research organizations and share their favorites. Talk about your family history and how *tzedakah* has played a role.

GENERATIONS OF GIVING

Dor L'Dor in Action

It's never too early—or too late—to inspire others in giving. But the earlier you teach the tradition of giving, the easier it will be to sustain. You can model the joy that you take in your philanthropy, and make it easy for those closest to you to give as well.



Share your values of philanthropy with your children and grandchildren and encourage them to be involved in your family's giving.

Several Foundation families have done just that.

David and Susan Kabakoff recently created donor advised funds for their children Jonathan, 20, and Sara, 22. "Giving back to the community has always been a meaningful part of our lives, and we wanted to get our children started in this tradition," said David. "Jonathan and Sara will now be able to support causes that are important to them and they know that *tzedakah* is a key priority."

On behalf of the **Viterbi Family Foundation**, **Aaron Smargon**, 16, visited the Kid City program at the Reuben H. Fleet Science Center. He then presented a program recommendation to the Foundation Board leading to a grant being awarded. "Aaron was able to provide us with a unique perspective of how young people would view the exhibit. We then relayed these recommendations to the Fleet Center, maximizing our impact on the program," noted Aaron's grandfather, **Andrew Viterbi**. "Now Aaron attends Foundation meetings when appropriate, joining in on our discussions and providing important insights. He's also serving on the national committee to plan the first-ever Jewish youth philanthropy conference."

Barbara Bloom's four sons, **Jeff, Larry, Scott and Todd**, each have an annual amount of money they can distribute from the **Bloom Family Fund**. These discretionary funds are tracked separately by the Foundation. "These funds have been very beneficial in helping our family think about the causes that are most important to us," said Barbara. "We've given to organizations as varied as the United Jewish Federation,

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Create a Jewish Legacy Program Continues Success

Since the inception of the Jewish Community Foundation's *Create a Jewish Legacy* program in April 2004, more than 205 families have stepped forward to create 293 legacy gifts, for an estimated \$44 million in future gifts for the community.

The legacies benefit the 12 organizations participating in the Foundation's **Endowment Leadership Institute** (ELI) as well as 35 other Jewish causes in San Diego, Israel and around the world.

"The *Create a Jewish Legacy* program and ELI have redefined the culture of giving in Jewish San Diego," noted Jane Scher, Endowment Leadership Institute Chair. "The generosity of our community and the collaboration of our organizations have proven to be a winning combination."

In November, the Foundation will hold an informational meeting for organizations interested in participating in a second Endowment Leadership Institute program. The second group will begin their three-year course in April 2006.



Recent ad promoting the program for Rosh Hashanah



Participating organizations include:

Agency for Jewish Education
 Congregation Adat Yeshurun
 Congregation Beth Israel
 Hillel of San Diego
 Jewish Family Service
 Lawrence Family Jewish Community Center
 JACOBS FAMILY CAMPUS
 San Diego Jewish Academy
 Soille San Diego Hebrew Day School
 Temple Adat Shalom
 Temple Solel
 Tifereth Israel Synagogue
 United Jewish Federation of San Diego County

Dor L'Dor *(continued from page 1)*

our synagogues, the Honorary Deputy Sheriffs' Association and Kids Included Together. What unites us is the goal of improving the community."

Peter and Elaine Chortek challenged their granddaughter **Emily**, 14, to go out and find an organization she believed was making a difference in the community. After Emily's research, the family awarded a grant to Jewish Women International,

helping those affected by domestic violence. "For us, it's all about *dor l'dor*—passing our values from one generation to the next," said Pete.

Every model is different according to family situations, yet one factor is consistent: Involving younger generations in giving empowers them to create a brighter future. It is the most vital gift you can bestow.



Julie Tedde, a participant of the SJSP program, shares her experience with members of the Jewish Women's Foundation.

Supporting Jewish Single Parents Begins Second Year

At a luncheon on September 13th, members and friends of the Jewish Women's Foundation celebrated the second year of the Jewish Family Service Supporting Jewish Single Parents (SJSP) program—conceived, established and funded by a JWF grant.

Julie Tedde, a single mother served by the SJSP program, spoke about the unique challenges that single parents face in connecting to the Jewish community and finding time for everything on their plates. She thanked the JWF for their support of the program and for their ongoing advocacy.

The SJSP program is one example of how the Jewish Women's Foundation, now numbering 45 active members, furthers its goal of addressing issues facing Jewish women and girls within the community.

New Beginnings



The sounds of the *shofar* on Rosh Hashana and Yom Kippur inspire a call to action and symbolize the beginning of a new year. Those partnering with the Foundation and so many in our community translate these sounds into acts of kindness year-round. Make this year a meaningful one—let the sounds of the *shofar* inspire you to create a brighter future.

Foundation News

Foundation Grantmaking

Reaches New Heights

Over the past five years, the Foundation has awarded over \$200 million in grants. Here are some highlights from the last year:

- More than 700 different organizations received grants totaling nearly \$46 million.
- The grants were directed to organizations in San Diego, the United States, Israel, Europe, Africa and around the world.
- Education topped the list as the area most supported by Foundation donors. Second was Health and Human Services.
- Approximately 42% of grants were directed to the Jewish community with the remainder distributed to secular organizations.

Foundation Sponsors Governance Seminar

The Jewish Community Foundation is proud to be a sponsor of *Exceptional Governance*, the 2nd Annual USD Institute for Nonprofit Leadership on February 16, 2006.

Welcome New Board Member

Welcome to new Foundation Board member **Jerry Turk**.

Welcome New Staff Members

Two new staff members have joined the Foundation team: **Marissa Garfield** as Foundation Associate and **David Lange** as Senior Staff Accountant.

Marissa assumed the position of Foundation Associate after working part-time with the Foundation on special projects. She graduated *cum laude* from UCSD in 2005 with a Bachelor of Arts in Political Science.

David held management positions in accounting in South Africa where he received his Bachelor of Accounting degree and training. He brings in-depth knowledge from his experience as a Charter Accountant (S.A.) and Cost and Management Accountant in England and Wales, to his new role at the Foundation.

Strategies for Giving Charitable Gift Annuities

Charitable Gift Annuities are a win-win giving option for donors 65 years or older.

For a minimum gift of \$10,000, you receive guaranteed payments for life while supporting the community after your lifetime. The income payments are based on your age; the older you are, the higher the payout rate.

You qualify for an immediate income tax deduction, based upon your age and income payout rate.

You may reduce capital gains taxes, as well as possible estate taxes by removing assets from your estate.

After your lifetime you can designate the remaining principle in your annuity to the charitable organizations of your choice.

Sample Payment Rates

Age	Rate
90+	11.3%
85	9.5%
80	8.0%
75	7.1%
70	6.5%
65	6.0%

Rates are subject to change.

Note: Prospective donors are encouraged to seek the advice of their professional advisors. While the payments made under a charitable gift annuity are subject to regulation by the California Life Insurance Department, they are not insured or otherwise guaranteed by the California Life Insurance Guaranty Association. Gift annuity payments are backed by the assets of the Foundation.

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To promote philanthropy through meaningful partnerships with donors and community organizations in achieving charitable goals To increase current and future support for a vibrant and secure Jewish community in San Diego, Israel and around the world.

