



Philanthropy News Quarterly

A publication of the Jewish Community Foundation of San Diego
online at www.jcfsandiego.org

Grants Improve the World

Families who partner with the Foundation for their giving put the Jewish concept of *tikkun olam* in action—improving the world, one grant at a time. Thousands of distributions are processed each year to hundreds of different organizations all around the world. Here are two ways that Foundation families have creatively approached grantmaking and used donor advised funds to strengthen the community and the world:

One family expressed a desire to assist the increasing number of military families in San Diego who are struggling to make ends meet. With spouses deployed and incomes limited, many families face a multitude of financial burdens including steep car payments, mounting utility bills, appliance repairs, and childcare. Together, this family, the Foundation and Jewish Family Service developed the **Military Outreach Project** which is not only meeting basic needs but also providing a case manager to work with military families in assessing all issues, distributing quick and direct emergency funds and connecting the families to other resources.



Mindful of their positive and life-changing experiences in summer camp, a young couple awarded a grant to the **Community Campership Council**. The organization's year-round **Kids to Camp** program offers camping, outdoor living and environmental training to youth ages six to 16 from low-income families.

Each individual grant stands alone in its potential to transform lives. Collectively however, they interweave with one another—improving the world in every area.

OUR MISSION

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 and general community in San Diego, Israel and around the world.

INSIDE

Book of Life Signing Recognizes Legacy Givers
PAGE 2

ELI Organizations Achieve Goals
PAGE 2

Stories of Strategic Legacy Giving
PAGE 3

IRAs: A Flexible Charitable Giving Option
PAGE 4



 **Jewish
Community
Foundation**
San Diego

Book of Life Signing Recognizes Legacy Givers



Members of the Fisher family celebrate their commitment to the Jewish community with Book of Life Chair Betty Byrnes.

On October 29, 2006 the Jewish Community Foundation held its fifth Book of Life Signing for the San Diego community. Chaired by Betty Byrnes and led by Rabbi David Frank of Temple Solel, the ceremony celebrated the individuals and families who have promised to leave a legacy gift of any amount to the Jewish community after their lifetimes. The Book of Life is a permanent archive for our community.

To date, more than 145 people have signed the Book of Life, expressing their belief in and commitment to Jewish values and heritage, and ensuring that our people will survive and flourish.

"By contributing to the Jewish community where we live, we want to preserve our legacy of giving by teaching philanthropy to our children, so they in turn can teach it to their children."

—EXCERPT FROM BOOK OF LIFE STATEMENT

The following individuals inscribed their names in the Book of Life at the signing ceremony.

Clive David

Tom and Judy Fisher

Melvin and Rory Goldberg

Karl and Audrey Jacobs

Chris and Emily Jennerwein

Myron and Laura Jucha

Jerome and Leona Levy

Mark and Ellen Moss

Irving and Anne Pintel

Bruce and Sheri Sachs

Sheldon and Lillian Scharlin

Steve and Linda Schechner

Leon Siegel

Louis and Tammy Vener



Shel and Lillian Scharlin inscribe their names in the Book of Life.

ELI Update: Organizations Achieve Goals

The first two Endowment Leadership Institute organizations have reached their three-year legacy goals. Jewish Family Service has established 54 legacies since the ELI program began in April 2004, and Temple Solel has established 36 legacies in the same time period.

To date, more than 390 families have stepped forward to promise 535 current endowment and legacy gifts for an estimated total of more than \$100 million in future dollars to the community.



Stories of Strategic Legacy Giving: *Dor L'Dor* in Action

Day after day at the Foundation, we have the privilege of working with individuals and families who tell us their stories. Stories of triumph, hope and community. These stories have conveyed our values, transmitted our rituals and sustained us as a people.

Key to all these stories is an entrepreneurial spirit—an optimistic intention to change the world through giving. Here are three examples of values combined with strategies to create lasting change.

Dr. Irwin and Joan Jacobs recently announced a magnificent endowment gift for the **Technion**, Israel's premiere institute of science, engineering and technology. Their long association with the Technion and their admiration for its students and faculty led to their contribution which will rename and expand the university's graduate school and provide funding for fellowships and research.

Peter and Elaine Chortek set out with a strategic mission for their legacy giving: to develop future generations of Jewish leaders and donors. Recipients of the endowments include the **Agency for Jewish Education**, **Hillel of San Diego**, and the **San Diego Jewish Academy**. The Chorteks were also the first donors to the Foundation's recently established **Endowment for Youth Philanthropy**.

As a wealth management advisor, **Joseph Cohen** seeks to link values with appropriate financial tools. He and his wife **Martha Farish** set up a testamentary giving vehicle from which they could make future financial commitments with certainty. The Foundation purchased a life insurance policy on them – and Joe and Martha recommend grants from a Donor Advised Fund toward the premiums. After both of their lifetimes, the insurance will fund grants in their names to specific community organizations that are important to Joe and Martha. They were able to increase their ultimate giving by a factor of eight times through this leveraged financial tool.

Welcome New Funds

Amer Family
Howard and Marsha Berkson Family
Stanley F. Bernstein
Cynthia Bolker and Greg Rizzi
Bresler Reinstein Family
Daniel Brodsky
Danny and Beth Dabby Family
Bella Y. Dalin
Diwenshtein Family
Disraeli Family
DME
Richard and Jessica Effress
Inge Feinswoog
Mike and Judy Feldman
Robert Fink
Fisher Children
Fujita/Medress Family
Graeme and Simone Gabriel Family

Howard and Andrea Greenberg Family
Grindstone Harbor Charitable
Rebecca and Jerry Gumpel
Robert and Bettye Johnson
JME
KAJ
Karl Strauss Brewers Education
Kate and John Kassir Family
Nadja Kander
Kobernick Family
Levine Breslauer Family
Jeffrey and Hillary Liber
Zita and Morris Liebermensch
Peter and Inge Manes
Andres and Libe Marek Family
Mayer Family
Sam N. and Celia Mellner
established by Max and Vera Mellner

Clive and Tamara Moch Family
Lori and Kenneth Polin Family
Michelle Rizzi
San Diego Walk for Darfur
Schwartz Family Charitable
Schoemaker Family
Sore Family
Leon and Frida Shteremberg
Nathan and Susie Shteremberg
Benjamin Siegel
Simon Family
Vick and Lea Soffer Family
Spitzer Family
Tuttleman Family Foundation
Dr. Stuart R. Weiss
Zyman Family

strategies for giving

IRAs: A Flexible Charitable Giving Option

The Pension Protection Act of 2006, highlighted in the last *Philanthropy News Quarterly*, has generated considerable interest in rolling over IRAs to charitable organizations. However, it's important not to overlook other charitable options for your IRA. With help from the Foundation you can make a gift to your favorite nonprofit organizations today or in the future, potentially reducing taxes.

Some options to help you in your planning:

Giving Now

- Take advantage of the IRA Charitable Rollover provision of the Pension Protection Act if you are over the age of 70½
- Donate part or all of your required annual IRA distributions if you are under the age of 70½.

Giving Later

- Name the Foundation as beneficiary of IRA assets after your lifetime, possibly avoiding estate and income tax for your beneficiaries

Please Save the Date

Applying Entrepreneurial Strategies to Philanthropy:

A Panel Presentation

February 22, 2007 at 4:00pm
 Congregation Beth Israel
 9001 Towne Center Drive
 San Diego, California

Circles of Commitment:

Is Passion the New Obligation?

Jewish Funders Network International
 Conference
 March 18-20, 2007
 Atlanta, Georgia

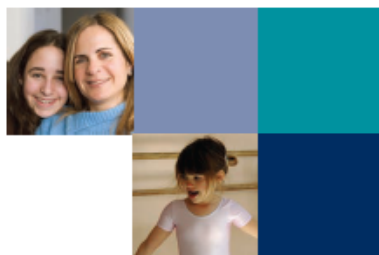
Jewish Community Foundation's 40th Anniversary Celebration

Evening of May 31, 2007

Location to be announced

Chairs: Murray and Elaine Galinson

Please call the Jewish Community Foundation for information.



board+staff

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