

## JEWISH COMMUNITY FOUNDATION Board of Directors

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Back Row (L-R): Gail Littman, Allison Small, Traci Serrano, Cynthia Zena, Myrna Holmes, Melissa Rognlie and Tiana Arellano. Front Row (L-R): Cindy Bertrand, Marjory Kaplan, and Charlene Seidle.

## Strategies for Giving Retirement Plans

Planning for a comfortable retirement is a top financial priority for most individuals. But, did you know that charitable giving can be an important part of your retirement planning process?

With help from the Foundation you can make a gift to your favorite nonprofit organizations today or in the future, as a way to reduce taxes for your estate or bring in an additional flow of income.

Some options to help you in your planning:

### Giving Now

- Donate part of all of your required annual IRA distributions
- Receive current income tax deduction
- Offset income tax on distribution
- Supplement your retirement income by setting up a Charitable Gift Annuity; you can receive payments for your lifetime, and create a legacy for the future.

### Giving Later

- Name the Foundation as beneficiary of remainder of IRA assets after your lifetime
- Avoid estate and income tax by your beneficiaries
- Designate to a life income plan to provide income for family members

Your financial advisor can assist you in determining the option that is best for your situation. For additional information, please call the Foundation at 858.279.2740 or visit our website at [www.jcfsandiego.org](http://www.jcfsandiego.org).

# PhilanthropyNewsQuarterly

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## Endowments: Leaving a Permanent Legacy

Like Sophie Brody, many others choose to establish endowments through the Foundation either during or after their lives.

Endowments enable you to set aside a sum of money to establish a fund with annual grants made to charitable organizations while the principal is preserved in perpetuity.

Most endowments are established by donors through a bequest in a will or trust that provides for:

- A specific organization or program
- A field of interest such as the elderly or social services in Israel
- The United Jewish Federation Campaign which supports the needs of Jews locally, in Israel, and around the world
- The Foundation's Unrestricted Endowment which awards grants to new and proven programs and provides emergency funding

No matter which option is chosen, the Foundation can assure donors that their intent will always be honored.

### Book of Life Signing

Mark your calendar for the next Book of Life signing ceremony:

May 22, 2005, 11:00 am  
Soille San Diego Hebrew Day School

The Book of Life is a permanent archive of those who have promised to keep our community strong for future generations. If you have left a bequest of any kind to the Jewish community, you are eligible to sign the Book of Life.

## Sophie Brody: A Blessing for Our Community

Sophie Brody, of blessed memory, lived her life by the principle of *tzedakah* or justice. Whether raising funds for the fledgling state of Israel in the 1950s, volunteering to assist new immigrants adjust to life in the United States, or strongly advocating for the development of Jewish female leaders in San Diego, Sophie was always actively addressing community needs.



"I have been lucky in this life, and I must help those who have not been."

—Sophie Brody

It is a goal that she continues to pursue even after her lifetime. Sophie's husband, Arthur, recently announced her significant legacy for the Jewish community in San Diego, Israel and worldwide through the establishment of the Sophie Brody Lion of Judah Endowment Fund. Each year, the Fund will provide significant support annually in Sophie's name to the Women's Division of the United Jewish Federation of San Diego, a cause about which Sophie was passionate.

"Sophie was an inspiration and a constant force for our women," said Miriam Robbins, UJF Women's Division Director. "She was respected and admired by all who knew her. When Sophie spoke, the room went silent, because she always had something powerful to contribute."

One of Sophie's greatest passions was to help develop female Jewish leaders in San Diego. During her life, she and Arthur set up two other endowment funds that provide annual grants to the Women's Division, enabling special leadership development programs.

Serving on the Boards of many different organizations including the Jewish Community Foundation and United Jewish Federation, one of Sophie's more recent affiliations was joining the Jewish Women's Foundation in response to a presentation by Chair Jan Tuttleman about the needs of Jewish single mothers in San Diego.

"Sophie approached me after the meeting and said she never realized the extent of need in the community. She asked if there was more that could be done to help ease their burden," said Tuttleman. "Each time I saw her after that day, she asked about the program. Her concern was genuine and moving."

Sophie was also devoted to Arthur and their children. In their Book of Life statement, Sophie and Arthur wrote that one of their key reasons for supporting the community through philanthropy was to "leave a legacy of giving for our children and grandchildren."

"We were blessed to have known Sophie and grateful to her for sharing her wisdom," said Edgar Berner, Jewish Community Foundation President. "Now her love for the Jewish people has been perpetuated through her legacy."



# Changing the Way Jewish San Diegans Give

The Endowment Leadership Institute (ELI) continues to change the face of giving in San Diego’s Jewish community. The results have been tremendous. Since April 2004, 173 legacies have been established by 112 families for an estimated \$32,233,780 in future gifts for our community. ELI, and its accompanying marketing campaign, has led to legacies for over 30 different Jewish causes, improving the quality of life for people locally, in Israel and around the world. It has stimulated thought and discussion by donors eager to make an impact on tomorrow.

“The success of ELI has exceeded all our expectations. Our community has been extremely generous and supportive,” said Marjory Kaplan.

Through ELI, the Foundation is partnering with 12 local Jewish organizations, synagogues and schools in a special three-year program of coaching, training and mentoring. All major denominations and constituency groups are represented.

In November, ELI held its fourth training session with

fundraising consultant and noted author Ed Schumacher. Schumacher led a workshop discussing the importance of developing and implementing a plan for obtaining bequests from current and prospective donors. As he humorously stated, “Creating a plan allows you to have success on purpose.”

Following the workshop Schumacher met individually, over a two-day period, with representatives of participating organizations to discuss their respective programs.

During Chanukah, all those who have created a Jewish legacy were honored in an ad placed on the back covers of local Jewish publications. We again honor these individuals and others who have come forth since the publication of the ads. They are an inspiration for our entire community.

If you are interested in finding out more about how you can create your legacy, visit our website at [www.createajewishlegacy.org](http://www.createajewishlegacy.org) or call us at 858.279.2740.

- Steve and Shelly Abramson  
Joyce Axelrod  
Melissa Garfield Bartell and Michael Bartell  
Ezra and Lisa Betch  
Irvin and Ruth Belenzon  
Jacob and Leslie Bercovitz  
Barry Berelowitz  
Mark Berger and Jackie Tolley  
Marsha Berkson  
Edgar and Julie Berner  
Ezra and Lisa Betch  
Terri Bignell  
David Bildner  
Scott and Karen Blumen  
Brian and Jan Borkum  
Jane Brand  
Mitchell and Merle Brodie  
Daisy Brodsky  
Nina Brodsky  
Sue Brothers  
Howard and Lucille Brotman  
Don and Betty Byrnes  
Miriam Chall  
Peter and Elaine Chortek  
Hal Cohen  
Michael and Myrna Cohen  
Melvin and Betty Cohn  
Arthur and Eilene Cummins  
Nell Demeter  
Carl Eibl and Amy Corton  
Daniel and Emily Einhorn  
David and Claire Ellman  
Lynn Elson  
Samuel Engel  
Jane Fantel  
Else Feistmann
- Earl Feldman  
Morey and Jeanne Feldman  
Walter and Pam Ferris  
Alberta Feurzeig  
Merle and Teresa Fischlowitz  
Nettie Fisher  
Richard and Sharon Fogg  
Pauline Foster  
Ron and Carol Fox  
Geanie Zelig Galinson  
Laura Galinson  
Murray and Elaine Galinson  
Stephanie Galinson  
Franklin and Jean Gaylis  
David and Sylvia Geffen  
Jay and Lisa Gelbart  
Jerrold and Myra Greenberg  
Glassman  
Joseph and Beverly Glickman  
Jeanne Gold  
Madeline Goldberg  
Lisa Goldstein  
Teresa Goodwin  
Herman and Jean Gordon  
Frank and Laurie Gore  
Robert and Joan Greenstone  
Sally Haims  
Helen Harlan  
Gordon and Barbara Haworth  
Marcia Hazan  
Freda Heller  
Betty Hiller  
Bess Hock  
Deborah G. Horwitz  
Mark Hurvitz and Deborah Prinz  
Fredericka Ingham  
Irwin and Joan Jacobs
- Edward and Linda Janon  
Cecile Jordan  
Lionel and Kim Kahn  
Marjory Kaplan  
Robert and Jodie Kaplan  
Jerry and Bea Karp  
Barry and Avra Kassar  
Miriam Katzin  
Nadja Kauder  
Lillian Kaufman  
Abraham Kleinman  
Gary and Theresa Kornfeld  
Ann Kripke  
Seth Krosner  
David and Jessica Kupferberg  
Robert Lazarus  
Ira and Susan Lerner  
Harriet Levin  
Rebecca Levine  
Arthur and Sandra Levinson  
Michael and Karen Levinson  
Fred Lewin  
Marshall, Gail and Rebecca Littman  
Hamilton and Estelle Loeb  
Irv London  
Craig and Marty Lotzoff  
Norman and Sivia Mann  
Brian and Suzanne Marcus  
Howard and Lottie Marcus  
Elias and Frances Margolin  
Ellen Marks  
Sally Marms  
David Meister  
Scott and Jennifer Meltzer  
Marcie Merel  
Ellen Miller



## Supporting Jewish Single Parents

The Supporting Jewish Single Parents program at Jewish Family Service, initiated and funded by the San Diego Jewish Women’s Foundation (JWF), is already connecting single mothers to the Jewish community and providing important advocacy and services. The program is the culmination of two years of research by the JWF and has been established with a three-year grant.

“San Diego’s Jewish community has double the national average of single-mother households. Thousands of families need our support,” said Jan Tuttleman, Founding Chair of the JWF.

One of the most exciting components of the program is parent extenders who will be available to assist with children’s transportation, errands and babysitting at a low cost. Many single mothers do not have extended family in San Diego, and these services are crucial.

“It can be especially hard for single mothers to feel welcome in the Jewish community,” said Marcia Hazan, JWF Grants Chair. “The program coordinator acts as an advocate. For example, the coordinator arranged for several moms and their children to attend high holiday services.”

The JWF combines hands-on philanthropy with community-driven projects to address the needs of Jewish women and girls. It is a powerful example of coming together to make the most impact. If you are interested in more information about joining the JWF, please call the Foundation.

# Foundation News

**Welcome New Funds**

Welcome and thank you to the following families and community groups who have established funds with the Foundation since October.

- Ruth and Irvin Belenzon
- The Emergency Response Foundation
- Daniel and Suzanne Engel
- Lenore Krems
- Malk Family
- Welt Family
- Two Anonymous Funds

**Foundation Implements SB 1262**

California’s Nonprofit Integrity Act (SB 1262) requires nonprofits to adhere to high standards in financial reporting and governance. The law also contains new administrative and legal guidelines for fundraising activities.

The Foundation has gone above and beyond what is required by law. This includes:

- Restructuring our audit committee
- Developing formal policies to protect whistleblowers and ensure the highest ethical standards
- Posting our 990 and annual report on the web site at [www.jcfsandiego.org](http://www.jcfsandiego.org)

**Chortek Family Receives Award**

At a recent Foundation Board meeting, Peter and Elaine Chortek were presented with the United Jewish Communities (UJC) Endowment Achievement Award. The award honors one family per community each year for significant dedication to building endowments.

“Peter and Elaine’s creative plan to develop future leaders and donors for the San Diego Jewish community has inspired many others. They exemplify *dor l’dor*, passing our values from one generation to the next,” said Marjory Kaplan when she presented the award.

## Ideas for Giving: *Youth and College Students*

*Each issue of Philanthropy Quarterly features several giving opportunities in a certain area of need.*

*This quarter, the theme is youth and college students. Jewish tradition has always placed the highest value on appreciating and encouraging the potential of young people as our community's future leaders. Of course, these are only a few of the many excellent programs that need support. We welcome your program ideas for future issues.*

**"The breath of youth is the reason for the world's existence."**  
—MAIMONIDES

### **Annual Campaign United Jewish Federation of San Diego County**

United Jewish Federation of San Diego County (UJF) is the central Jewish community planning and fundraising organization. The UJF Annual Campaign supports many vital community programs as well as important projects for Jews in Israel and 60 countries around the world. Through its network of organizations, UJF helps the young, the old, the poor, the sick, the immigrant, and those who are persecuted or oppressed, all in the name of the San Diego Jewish community.



### **Hebrew Classes Agency for Jewish Education**

A high-quality Hebrew for credit program allows students to approach Judaism from a different perspective. It also provides academic incentive for young people to learn Hebrew and interact with their Jewish peers.

- 81 students currently enrolled in program with hundreds of young people educated since inception
- Program is accepted and approved for foreign language credit by public schools

### **Community College Programming Hillel of San Diego**

The college years are the time when many young people form lifelong friendships and relationships. It is essential to provide them with opportunities to connect with other Jews. In the past, Hillel efforts were focused

just on SDSU and UCSD. Now, a special coordinator works with students from community colleges to include them in Jewish life,

- Holiday-themed programs include High Holiday activities, *Chanukah* party and Passover *seder*
- First *sukkah* built this year at Mesa College
- 100 people got to know each other on informal dates at JDating Social

### **Shabbat Celebrations Hillel of San Diego**

Each week, students at local universities celebrate Shabbat, the cornerstone event of Hillel's campus community. Students look forward to coming together after a long week of studying and exams.

- Services for all denominations held followed by group dinner
- Hundreds of students participate from SDSU, UCSD, USD and community colleges

### **Jewish Big Pals Jewish Family Service**

One out of every three children in San Diego lives in a single-parent home, primarily headed by single mothers. Jewish Big Pals pairs Jewish children from such households with adults to serve as a mentors and friends.

- Studies demonstrate that such mentoring relationships reduce key factors such as drug/alcohol abuse, truancy and violence
- Helps foster Jewish connection and identity
- 30 matches this year

(over for more ideas)





## Teen Programs

### Lawrence Family JCC

Through a wide variety of programs, the Jewish identities of students in grades 6-12 are strengthened. The welcoming Teen Activity Center offers a safe, supervised environment for teens to meet with friends, complete homework, and use the computer—all with the leadership and oversight of a dedicated Teen Director.

- Activities include SAT classes, college trips, participation in community events, dances and Red Cross training
- Hundreds of teens served—both affiliated and unaffiliated

## Maccabi Games

### Lawrence Family JCC

The annual Maccabi Youth Games unite Jewish teens from around the world for a week of competition in team and individual sports, social activities and cultural programming. Through the games, Jewish teenagers from small and large communities

around the world get to know one another, providing an important framework for enriching Jewish identity.

- 75 San Diego delegates will participate in 2005
- San Diego's JCC will be hosting the games in 2008—sure to be a tremendous community builder

## Sha'ar HaNegev Youth Activities

Sitting directly on the border with Gaza, residents of San Diego's partnership community Sha'ar HaNegev have seen their lives changed dramatically. Many children no longer play outside, and teens are under much restriction. To keep them occupied in safe locations, the municipality has established an extensive program of after-school and evening activities.

- 18 youth counselors provide mentoring and leadership
- Serves 450 children, grades seven to twelve, and 600 elementary school children
- Youth club and lounge available, tutoring, community service, and counseling

## Israel Travel/Study Scholarships

Traveling to Israel is one of the most powerful ways to ensure a young person's future Jewish identity.

Yet, for many, the high cost of such an experience is a prohibitive factor.

- UJF Israel Center awarded 31 need-based scholarships last year. Many more were requested.
- Scholarships are highly effective in



stimulating travel to Israel.

## Children's Initiative in FSU

Thousands of Jewish children in the FSU go without food and basic care and are in need of critical emergency assistance. Single mothers or elderly grandparents parent most of these children single handedly on meager salaries, pensions or odd jobs. The American Jewish Joint Distribution Committee works to provide a better life for these families in three areas. Funds can be designated for a particular city or region.

- Basic needs: providing food and clothing
- Medical services: medicines, treatments, tests, equipment (such as wheelchairs and glasses), hospitalization, and dental care
- Emergency winter relief: blankets, warm clothing and boots

If you have questions about any of the programs featured or would like information regarding other giving opportunities, we stand ready to assist you. Please call the Foundation at (858) 279-2740.