

Charitable IRA Rollover provision is set to expire December 31, 2013

Congress reinstated the IRA Charitable Rollover for 2013 as part of the American Taxpayer Relief Act (ATRA) passed on January 1, 2013. If you are age 70 ½ or older, you may make a gift of up to \$100,000 per year to the Federation from your IRA with no federal income tax impact. Use this opportunity to make your Annual Campaign gift, establish a permanent endowment, or fund a designated program in the Jewish community, such as PJ Library. *UJEF does not provide tax or legal advice. Donors should consult with their tax, financial or legal professional as to the best gift method for their situation.*

- BENEFITS**
 - Allows donors to make distributions directly from their IRA or Roth IRA to UJEF/JFGW that avoid federal income tax because the distributions are not included in the donors’ federal adjusted gross income.
 - Distributions can be used to pay a pledge, establish an endowment or add to an existing endowment. Donors can restrict the purpose of the contributions.
 - The distribution counts toward the donor’s required minimum distribution.
- RESTRICTIONS**
 - Maximum charitable distribution from the IRA is \$100,000 total in one year.
 - Donor must be at least age 70 ½ years old.
 - The provision expires December 31, 2013. Act now!
 - Donors do not receive a charitable deduction for the distribution, but the money is not counted in the federal adjusted gross income of the donor.
 - Distribution CANNOT be used for a donor advised fund/ philanthropic fund, charitable gift annuity, charitable remainder trust or pooled income fund.

The United Jewish Endowment Fund of The Jewish Federation of Greater Washington strives to help our community provide an enriched Jewish life today and a vibrant Jewish tomorrow. The Legacy Society recognizes those individuals who create a permanent fund of at least \$10,000 to sustain the vitality and strength of our Jewish community. Donors with permanent endowment commitments over \$100,000 are recognized by the Book of Life. Donors with Perpetual Annual Campaign Endowment or Lion of Judah Endowment commitments over \$200,000 or other permanent endowments of \$500,000 or more, are recognized by the national Star of David Society of the Jewish Federations of North America. Endowments may be created during your lifetime or by bequest, please mail in the response form for more information.

Please check the appropriate box, complete your contact information and mail this form to: United Jewish Endowment Fund • 6101 Montrose Road, Rockville, Maryland 20852

☐ I have included The Federation/United Jewish Endowment Fund in my estate plans.

I would like more information on the following:

- ☐ Legacy Society
- ☐ PJ Library
- ☐ Create a Jewish Legacy
- ☐ Acorn Funds
- ☐ Ways to establish a fund
- ☐ IRA Charitable Rollover

Name

Address

Daytime phone

Email

ISRAEL YOUR WAY

A one-of-a-kind journey through Israel with **3 CUSTOMIZED EXCURSIONS** to choose from, culminating at The Jewish Federations of North America’s General Assembly.

WHICH EXCURSION WILL YOU CHOOSE?

NOVEMBER 4-13, 2013

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THE CULTURE OF ISRAEL

For more information, visit shalomdc.org/israelyourway or contact Rachel Korycan at 301-230-7281 or rachel.korycan@shalomdc.org.

DATE
Thursday, June 6, 2013
7:00 p.m. prompt start
Program followed by
dessert reception and
Innovation Expo

LOCATION
Carnegie Institution
for Science
1530 P Street NW
Washington, DC

REGISTRATION
To register and for
more information, visit
shalomdc.org/annualmeeting
RSVP requested by June 4

TRANSPORTATION
Valet parking
available for \$10.00
Paid parking is also available
at garages located at
1616 P Street and 1515 15th Street
Closest metro station is
Dupont Circle

Join us to celebrate a community on the cutting edge. Together, we will honor the accomplishments of our outgoing president **Stuart S. Kurlander** and welcome our incoming president **Liza Levy**.

Program
2013 Annual Meeting
A MULTI-GENERATIONAL EVENING OF INNOVATION AND INCLUSIVITY
Featuring
2013 ConnectGens Fellows
Presentation of
2013 Awards

United Jewish Endowment Fund
The Jewish Federation of Greater Washington
6101 Montrose Road
Rockville, MD 20852-4816

Non-Profit Org.
U.S. Postage
PAID
Bethesda, MD
Permit No. 9085

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1
PJ LIBRARY®

2
IN MEMORY OF
DICK ENGLAND (Z'L)
UJEF GRANTS
IN MEMORIAM

3
IN MEMORY OF
JACK KAY (Z'L)
CREATE A JEWISH LEGACY

4
MAKING AN IMPACT
AND SEEING IT GROW
ISRAEL@65

5
CHARITABLE IRA ROLLOVER
ISRAEL YOUR WAY
INFORMATION FORM

6
ANNUAL MEETING

PJ Library® Comes to the Greater Washington Area!

The blue envelope arrives in the mail, addressed to the child and his little sister. It also says, “A gift from The Jewish Federation of Greater Washington, the United Jewish Endowment Fund and generous local donors,” but he doesn’t stop to read that. He rips it open to find this month’s PJ Library® book, selected especially for him and runs to his parents shouting, “Read it! Read it!”

These are the moments that happen every month for over 110,000 children across the continent. And now, they will happen all around the Greater Washington area, too. PJ Library sends out high-quality Jewish songs and stories, selected for their timely themes or Jewish values and the child’s age level.

Imagine turning the snuggly time with a child or grandchild nestled on your lap into a memorable Jewish moment. UJEF believes in the power of this program to connect Jewish and interfaith families to each other and to Jewish life, making sure that the financial support is there to bring this to 6,000 area families with children under eight years old.

PJ Library also goes beyond the books to engage and welcome families in Jewish activities co-sponsored with JCCs, congregations, preschools and

A Newsletter from the United Jewish Endowment Fund of The Jewish Federation of Greater Washington

Spring/Summer 2013



partner agencies. PJ Library’s potential impact appears to be greater for families that are less involved with Jewish community life, including interfaith families. A majority of PJ family members report that participating in PJ Library makes them feel more connected to their or their partner’s Jewish heritage.

We have enrolled 1,200 families in PJ Library in just the first few weeks since the launch. Clearly, it’s a program that has been long desired by area families who had heard about the program’s offerings in other communities. We look forward to enrolling families who were not previously connected to Jewish life. In other areas of the country, one-quarter of PJ Library families were previously unknown to the organized Jewish community. Imagine welcoming 1,500 new Jewish families into the community through PJ Library!

If you’d like more information about PJ Library or to sign up a family, please go to shalomdc.org/pjlibrary.

United Jewish Endowment Fund Grants
Spring 2013

Alexander Muss High School in Israel
\$3,099 for High School in Israel

Alnuhud
\$20,000 for Mentorship Community Awareness

American Jewish Joint Distribution Committee
\$70,000 for the Center for Young Adults in Afula

American Jewish Joint Distribution Committee
\$93,000 for STRIVE and Multi-Purpose Employment Center in Be'er Sheva

Coming of Age in Northern Virginia
\$88,970 for geriatric services in Northern Virginia

Ethiopian Empowerment Committee
\$9,000 for Inya Linya in Beit Shemesh

Ethiopian National Project
\$57,500 for SPACE Program for Matriculation Exam Preparation

Ethiopian National Project
\$15,000 for Youth Outreach Center in Beit Shemesh

Israel Venture Network
\$67,000 for IVN Partnership Programs

IT Works
\$25,000 for vocational training and opportunities

Jewish Agency for Israel
\$15,000 for Israel Fellow

Jewish Agency for Israel
\$62,500 for Ketzee—Social Businesses

Jewish Community Center of Greater Washington
\$14,600 for Partnership to Serve Seniors at Har Tzeon (Partnership with JSSA, JCA & Har Tzeon)

The Jewish Federation of Greater Washington
\$86,604 for Israel Quest

The Jewish Federation of Greater Washington
\$100,000 for PJ Library

Jewish Social Service Agency
\$12,500 for Coming of Age in Maryland

Joint Distribution Committee
\$90,000 for PACT and PACT Plus in Afula

Mahut Center
\$12,000 for Advancing Employment for Women Over 45

United Jewish Endowment Fund/The Jewish Federation of Greater Washington
\$250,000 for the Jewish Food Experience

Washington DC Jewish Community Center
\$31,000 for Behrend-Adas Senior Fellowship

For more details about these grants, visit shalomdc.org/ujef and click on Endowment Fund Grants.

In Memory of Dick England (z'l)

By Dottie Bennett

At the Create a Jewish Legacy (CJL) training session held in April, Dottie Bennett, Board member and Federation CJL team member, gave a moving D'var Torah. She recalled how Dick England had an impact and will continue to do so through his inspiring actions in our community.

The Torah commands us to perform certain *mitzvot*, among which is the counting of the Omer. The origins of the Omer count explain that when the Children of Israel left Egypt, they were told by Moses that 49 days after the exodus they would be given the Torah. You can imagine how exciting the prospect of a spiritual liberation would be. Thus, following the physical emancipation from Egypt, they kept count of the passing days that ended with the giving of the Torah at the foot of Mount Sinai. The Omer may be counted in any language, but understanding what it means is imperative.

There are certain ideas here in these simple sentences that are pertinent to our work:

- 1) the Torah commands us to do certain things.
- 2) although you can count in any language, you must understand what you are saying and why you need to act.

Raising money for our Jewish community requires both ideas. You are doing a commandment and you understand the need. Without both of those, neither will be successful.

This brings me to a story I relived this past week as we extolled the amazing leadership our community got from Dick England. I recall, as vividly as if it was yesterday. Dick was standing up at a Federation Board Meeting years ago and saying the following, “I make a big gift to Federation. What would happen if I died today! My gift would be lost and it would take a superhuman effort to make it up, if at all.” He proposed endowing his gift so that it would serve the community in perpetuity. He did just that and was the inspiration in my endowing my Lion of Judah and consequently developing other vehicles which are managed by the Endowment Fund.

In his memory, I suggest we all redouble our efforts to count our personal ‘Omer’ and help insure the future of our Jewish community by speaking the language of Legacy.

Dottie Bennett taught school for more than 20 years and is deeply involved in the issues of Jewish education and in efforts to maintain and enhance Jewish identity. She served on the Board of the United Jewish Endowment Fund, its grants committee and as Vice President for Multiple Appeals of the Jewish Federation of Greater Washington.

In Memoriam

We mourn the passing of Legacy Society members:

Richard England (z'l)

Jack Kay (z'l)

Libby Mandell (z'l)

Beatrice Marcus (z'l)

Dorothy Passer (z'l)

Rebecca Rieger (z'l)

(z'l) = of blessed memory

In Memory of Jack Kay (z'l)

By Meredith Jacobs

This story is an excerpt from the article titled, “Jack Kay, 88,” which was published in the April 25, 2013 edition of the Washington Jewish Week.

The D.C. community lost a lion as Jack Kay quietly passed away on Sunday, April 21 at age 88. “His parents imbued him with a sense of tzedakah and community,” said Laura Apelbaum, executive director of the Jewish Historical Society of Greater Washington. This circle of friends and family took responsibility in building and caring for the community both here and in Israel. “His parents’ house was a gathering place. Jack described them as ‘that exciting generation’ - he wanted the Historical Society to write about them.” It was Apelbaum who described Jack Kay as a “lion” - as

one who fiercely protects his family and his community. Stuart Kurlander, president of The Jewish Federation of Greater Washington stated, “Jack was engaging, probing. He asked very often tough questions. He wanted to know and understand. And then there was his soft side.” “Wherever I looked, Jack had been there,” said Federation past president Phyllis Margolius, who met Kay when she took a leadership role in the Federation in the early 1980s. “Eventually I became president, Jack had been president. Eventually I chaired the Endowment Fund, Jack had chaired the Endowment Fund. There was hardly a major community campaign that he wasn’t part of the leadership.” “He was generous and warm and cared deeply not just about the Jewish community but individual Jews in the community,” she continued. “He did things quietly when he could, and publicly when he could be a role model. I can’t think of anyone who didn’t like Jack. People wanted to be part of what Jack was part of. If Jack was part of your organization, you knew people

would be attracted to you.” Most recently, Joshua Bernstein, CEO of Bernstein Management Corporation and vice president at large for the Federation, was quietly raising funds to allow the Federation to acquire a new building. Kay donated one and a half million dollars. “I said, ‘Why are you making things so easy for me?’ “ Bernstein repeated while laughing at the memory. “He said, ‘Why wouldn’t I make things easy for you? You’re doing great things for the community.’ “ “He wanted to support the next generation of leaders,” said Bernstein. “His shoes will not easily be filled.” Jack Kay’s final days were spent in the care of JSSA’s hospice, a reminder of the cyclical nature of community - that those who support the community will at some moment in life find themselves recipients of support from the community. “I’m looking at a picture of him and his wife in my office,” said JSSA CEO Ken Kozloff, who considered Kay a mentor. “Just such a great guy. Such a wonderful, wonderful guy.”



A RICH INHERITANCE

Our community keeps reinventing itself, finding new ways to engage young people and adults, families and singles, in the rich fabric of Jewish life. But some things never change. Like the way each generation plans and builds for the next, making sure the foundations of Jewish life are strong and can respond to evolving needs. When you leave a Jewish legacy, you join this chain of builders. You leave your children and grandchildren a precious inheritance, and a lasting testimony to your values.

To learn more about making a legacy gift, contact Jennifer Scher at 703-286-1039 or jennifer.scher@shalomdc.org.

Create a Jewish Legacy · www.JewishLegacyGW.org

Making an Impact and Seeing it Grow

Ira Bartfield’s Perpetual Annual Campaign Endowment (PACE) will support The Federation’s Annual Campaign V’dor, v’dor, from generation to generation.

Ira Bartfield has been involved with the Greater Washington Jewish community for over three decades. This recent retiree from the National Gallery of Art with a marvelously individual sense of humor has been a supporter of and ambassador for Federation in Northern Virginia since the 1980s. Ira is passionate about the Jewish community here and in Israel and decided to endow his annual campaign gift by creating a PACE fund through a unique gift concept, an Acorn Fund. “I was inspired to support the annual campaign because I know The Federation has the knowledge and expertise to assess the needs and determine the most effective way to allocate resources in the community,” remarked Ira. “When I heard about the Acorn Fund concept to create a PACE, I was intrigued. I liked the idea that I could seed this permanent endowment fund and it would blossom over time and have an impact in the community for many years into the future.”

Ira created his endowment fund with contributions over four years. This Acorn fund is invested with UJEF, and when the fund reaches its target amount or date, it will make distributions to the Federation Annual Campaign. “The annual campaign touches so many institutions in our community and overseas, I couldn’t think of a better way to leave a legacy,” recalled Ira. “I love our Jewish community. The volunteers and professionals work day and night to nurture and enhance the Jewish community. I feel a real sense of people helping people and I wanted my annual gift to continue, even when I could no longer be here.” The Jewish community has benefited from Ira’s commitment and volunteer service. And, his endowment commitment will have an impact in the community for many years to come.

Ira Bartfield currently serves on the board of Gesher Jewish Day School in Fairfax, Virginia and is on Gesher’s Create a Jewish Legacy committee. Ira retired last year after serving on the staff of the National Gallery of Art for over forty years. He held supervisory positions in the Education and Visual Services departments. He and his wife, Kathryn, live in Arlington, VA.

Acorn Fund at a Glance

- Acorn Funds give you a way to build an endowment fund over time. When you seed an Acorn Fund, over time, the investment will help the Acorn grow into a much larger endowment fund.
- The United Jewish Endowment Fund invests your contribution and waits to make distributions until the fund reaches the target dollar amount or a maximum number of years (up to 30 years).
 - Once the target amount or date is reached, your fund will begin to make distributions annually to benefit the Jewish community.

Learn more at shalomdc.org/ujef

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@65



RANDI IS UPDATING THIS DESIGN

MUSIC FESTIVAL

SUNDAY JUNE 9, 2013 12-5:00 PM

UNION MARKET • DC

SHALOMDC.ORG/ISRAELAT65

Rain or shine

Free parking available

Red Line to NoMa-Gallaudet (New York Ave)

The Jewish Federation of Greater Washington welcomes the participation of interfaith couples and families, and people of all abilities, backgrounds and sexual orientations.