

We mourn the passing of Legacy Society members:

Sylvia Blajwas (z”l)	Frank Ridge (z”l)
Daniel Ohlbaum (z”l)	Clarence S. Siegel (z”l)
Leah Resnick (z”l)	Richard J. Stahl (z”l)
Arthur A. Rice (z”l)	Donald D. Weisman (z”l)

(z”l) = of blessed memory



The United Jewish Endowment Fund (UJEF) of The Jewish Federation of Greater Washington strives to help our community provide an **enriched Jewish life today and a vibrant Jewish tomorrow**. The Endowment Fund connects philanthropists with opportunities to meet Jewish needs and *tikkun olam*—repairing the world. Together, we strengthen and advance Jewish life in the Greater Washington area and around the world.

Just as our Jewish community is supported by annual gifts ensuring our community’s network of programs and services each year, our community also benefits from previous generations that planned for the future by establishing permanent endowments. UJEF provides you with the opportunity to establish a legacy that will **shape and improve Jewish life for generations**.

You can make gifts to UJEF outright during your lifetime or through one of the planned giving vehicles. Add your gift to an existing endowment fund or create a new fund to support a specific field of interest, the annual campaign or unrestricted needs. In addition to permanent endowments, we offer Donor Advised Funds to assist you and your family in streamlining your philanthropic giving. You may establish a Donor Advised Fund as a permanent or non-permanent endowment.

The **United Jewish Endowment Fund’s 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. If you establish a fund of \$200,000 or more, you will become a member of the national Star of David Society of the Jewish Federations of North America. Planned gifts of any amount will be recognized by the Create a Jewish Legacy program.



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

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:

- |   |  |
|---|--|
| <input type="checkbox"/> Lion of Judah Endowment      | <input type="checkbox"/> Family Philanthropy     |
| <input type="checkbox"/> Create a Jewish Legacy       | <input type="checkbox"/> Agency/Synagogue Funds  |
| <input type="checkbox"/> Allied Professionals Network | <input type="checkbox"/> IRA Charitable Rollover |

Name	
Address	
Daytime phone	Email

## Grant Updates

These programs are made possible thanks to UJEF

**STRIVE**, a JDC initiative in the Be'er Sheva Employment Center, transforms lives. Its intensive, month-long course for chronically unemployed young adults elicits their hidden ambitions and personal strength, guides them to immediate entry-level employment and individually guides them to career paths. The program takes adults struggling with poor self-esteem and discipline who lack understanding of their talents and vision and places 80% in jobs. Last year, the program served over 700 clients and is looking to serve even more in the future.

Last year, we introduced **Cinderella**, a domestic help service company that provides safe transportation, pays a fair wage and provides social benefits and insurance for domestic workers who may otherwise face abusive working conditions. All over Israel, domestic help service companies exploit socio-economically disadvantaged women who have no employment prospects due to lack of transportation, education or language. Cinderella, under the umbrella of NGO Eden, is changing this reality in the Negev. Over the course of the funding period, Cinderella grew considerably, recruiting 30 “Cinderellas” into the program and catering to 120 homes.

Contact Linda Kraner at **301-230-7242** or [linda.kraner@shalomdc.org](mailto:linda.kraner@shalomdc.org) for more information on grant programs.



[shalomdc.org/UJEF](http://shalomdc.org/UJEF)



The Jewish Federation of Greater Washington  
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Questions? Contact Us!

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[endowment@shalomdc.org](mailto:endowment@shalomdc.org)

Take action before year-end for your annual campaign gift or to create your legacy through an IRA Charitable Rollover.

If you are age 70½ or older, you may give up to \$100,000 from your IRA to charity without recognizing the federal return.

The direct charitable transfer counts toward the Required Minimum Distribution rule for IRA accounts.



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## A Lion of Judah Endowment is a Light Unto the Future

The Lion of Judah is a symbol of a Jewish woman’s strength and her financial commitment to bettering the world through The Jewish Federation’s Annual Campaign.

When a woman endows her Lion of Judah gift, she recognizes the need for an investment in her community to continue providing help when and where it is needed – forever. She commits to future generations, becoming an *or Latid*, a light unto the future.

Debra Reiter Panitch is perpetuating that light.

Debra grew up with Jewish philanthropy all around her. As a child, she sat beside her father as she decided how much and where the family should give *tzedakah* (charity) in honor of Rosh Hashanah. For her Bat Mitzvah, her grandmother made her a life member of Hadassah. In college, she spent time volunteering with Hillel to encourage classmates to give to the UJA Annual Campaign. As adults, she and her siblings are all active in their local Federations.

Making the decision to endow her Lion of Judah gift was a natural decision for Debra.

She explains, “From my grandmother’s generation to mine, I have seen the way that women have played an increasing role in philanthropy and Jewish life.



*Debra and her mother, above, unknowingly made the decision to endow their Lion of Judah gifts in each other’s honor at the International Lion of Judah Conference in 2004.*

While I believe that it is important to give joint gifts as a family, it is important for me, and for other women, to give on their own. Even if you are writing two different checks to the same place, it is so important that women have a voice and give. Even if it is a small amount, it still matters.”

Now, as a parent herself, Debra is teaching her children the value of helping those in need. Just as her father did years ago, she sits with her children and allows them to make decisions about philanthropy. Debra’s Lion of Judah Endowment models to her children the beauty of giving and securing the future of our Jewish community.

Are you interested in joining Debra and more than 80 other local women in becoming an *or Latid*? Contact Jennifer Young at 301-230-7235 or [jennifer.young@shalomdc.org](mailto:jennifer.young@shalomdc.org).

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

Winter 2013



Have you included the Jewish community in your estate plans?

Support the agencies and congregations you love with a lasting legacy gift.

[JewishLegacyGW.org](http://JewishLegacyGW.org)

- Adat Shalom
- Agudas Achim Congregation
- Beth El of Montgomery Country
- Beth Shalom Cong. & Talmud Torah
- B'nai Israel Congregation
- B'nai Shalom of Olney
- Capital Camps & Retreat Center
- Chabad of Northern Virginia (Arlington/Alexandria)
- Chabad of Northern Virginia (Fairfax)
- Chabad of Northern Virginia (Reston/Herndon)
- Chabad of Northern Virginia (Tyson's Corner)
- Charles E. Smith Jewish Day School
- Congregation Adat Reyim
- Congregation B'nai Tzedek
- Congregation Olam Tikvah
- Gesher Jewish Day School
- JCC of Greater Washington
- JCC of Northern Virginia
- Jewish Community Relations Council
- Jewish Council for the Aging
- Jewish Foundation for Group Homes
- Jewish Historical Society of Greater Washington
- Jewish Primary Day School of our Nation's Capital
- Jewish Social Service Agency
- Kol Shalom
- Melvin J. Berman Hebrew Academy
- Ohr Kodesh Congregation
- Temple B'nai Shalom, Fairfax Station
- Temple Micah
- The Jewish Federation of Greater Washington
- University of Maryland Hillel
- Washington DC JCC
- Yeshiva of Greater Washington

## Passion, Purpose and a New Partnership



The United Jewish Endowment Fund's Create a Jewish Legacy (CJL) program is proud to announce that we were selected to participate in the Harold Grinspoon Foundation's (HGF) LIFE & LEGACY™ program as one of only 15 Jewish communities from across North America. The program brings additional resources to CJL partners through incentive grants, training and additional professional support. Partner organizations that meet specific legacy commitment goals will be eligible for incentive grants. The partnership with LIFE & LEGACY will enable CJL partners to more effectively build permanent endowments.



## What can you do to help?

- If you have included a synagogue, agency or other Jewish organization in your estate planning, let them know.
- Ask your synagogue or favorite Jewish organization if they are partners of Create a Jewish Legacy.
- Consider updating the beneficiaries of your life insurance, IRA or estate plan to include the Jewish community.
- Discuss your legacy giving plans with your friends and family, and encourage them to follow in your footsteps.

To learn how to create YOUR Jewish legacy, please visit [JewishLegacyGW.org](http://JewishLegacyGW.org) or contact Jennifer Scher at 703-286-1039 or [jennifer.scher@shalomdc.org](mailto:jennifer.scher@shalomdc.org).

## Engage Your Family in Your Philanthropy



Is your family actively engaged in philanthropy? Have you considered moving beyond philanthropy through responsive check writing to more thoughtful, targeted giving? Do you hope to share values and family history with younger generations?

We are available to help you and your family explore your charitable interests and journey to strategic, engaged philanthropy.

Professionals are available to work with you. Please contact Jennifer Young at 301-230-7235 or [jennifer.young@shalomdc.org](mailto:jennifer.young@shalomdc.org) for more information.

Here are some **ideas to consider** as you think about your legacy and philanthropic goals:

- Learn about your family's history and philanthropic legacy.
- Talk with your children and grandchildren about philanthropy and the issues that are important to them.
- Articulate the values that inform your philanthropy.
- Make a challenge grant or matching grant to stimulate change.
- Call a professional with the United Jewish Endowment Fund to discuss your family's philanthropic goals and how to have an impact in our community.

## Agency/Synagogue Endowment Funds Ensure a Vibrant Future

The United Jewish Endowment Fund (UJEF) offers agencies and synagogues the opportunity to use the resources of UJEF's investment and administrative expertise to manage their endowment funds.

Does your favorite Jewish agency or synagogue have an endowment? UJEF can help that organization manage those very important funds.

Combining resources from multiple organizations allows stronger, more diverse, more effective investing. Uniting Jewish organizations with shared values creates a stronger Jewish community. In addition, we are

able to share our professional expertise, superior customer service and good results with the agencies and synagogues that invest with us.

Details of the UJEF investment performance history, fees and a copy of an Agency Fund Agreement are available upon request.

For more information, contact Elizabeth Goldstein, Esq., at 301-230-7228 or [elizabeth.goldstein@shalomdc.org](mailto:elizabeth.goldstein@shalomdc.org).

### Why should an Agency/ Synagogue Invest with UJEF?

- Shared goal of strengthening the future of the Greater Washington Jewish community.
- Professional investment management with good investment results.
- Clear online reports.
- Responsive customer service and flexibility with fund reporting and operational support.
- Easy withdrawals.
- Access to top investment managers who have high dollar thresholds for entry investments.

For The Jewish Federation's upcoming events, visit [shalomdc.org/savethedate](http://shalomdc.org/savethedate)

## PJ Library® Celebrates Books Around Town

PJ Library launched in our community in April and has grown to over 3,000 families with over 30 programs in just the first six months. PJ Library distributes free age-appropriate books and music to children ages six months to eight years old. UJEF provided funding for this program to engage Jewish families and connect them to our community. Families are attending programs and parties, services and story times, all over the Greater Washington area. Take a look at the fun PJ families are having! Learn more at [shalomdc.org/pjlibrary](http://shalomdc.org/pjlibrary).



## Join Our Allied Professional Network

Are you an estate planning attorney, financial planner or life insurance agent? Together, we can assure community members have the proper tools and plans for their philanthropic legacies.

Our team can provide information on planned giving vehicles and philanthropic advisory services that can help your clients have a greater charitable impact. Some of the gift vehicles and services we offer include:

- Life Income Gifts – we can provide gift illustrations for Charitable Gift Annuities (CGA) and Charitable Remainder Trusts (CRUT/CRAT).

- Philanthropic/Donor Advised Funds – we offer charitable donor advised funds as an alternative to private foundations.
- Multigenerational Family Philanthropy consulting services – we work with families to explore succession planning for their private foundations and strategies for including their children or grandchildren in their charitable giving.

We also offer networking and educational events, as well as a weekly e-newsletter about relevant topics in your field. We can assist you in providing charitable solutions for common estate and financial planning issues.



To access these resources and to sign up for the e-newsletter, visit [shalomdc.org/ujef](http://shalomdc.org/ujef) and click on "For Advisors:."

Questions? Contact Jennifer Scher at 703-286-1039 or [jennifer.scher@shalomdc.org](mailto:jennifer.scher@shalomdc.org).

### Keep These Giving Tips in Mind as we Approach Year-End

Here are some ideas to consider:

- Making larger charitable gifts can lower this year's tax bill.
- Donating appreciated stock that you have held for one year or more may help you avoid capital gains tax.
- Giving larger charitable gifts or donating stock can pair wonderfully with creating a Donor Advised Fund (DAF) with UJEF.
- Giving appreciated stock to establish a life income gift, such as a charitable gift annuity, can provide you income for life.

For additional giving tips, visit [shalomdc.org/ujef](http://shalomdc.org/ujef).