



Jewish Foundation
OF GREATER NEW HAVEN

2023 FIRST QUARTER **NEWSLETTER**



BECKERMAN FAMILY PACE CHALLENGE

Perpetual Annual Campaign Endowment

Planting the seeds for a long-lasting legacy
Made possible by a grant from the Beckerman Family Foundation

ABOUT THE CHALLENGE

Established in partnership with the Beckerman Family Foundation, the \$2 million Beckerman Family PACE Challenge is a 1:1 match intended to secure the future of the Greater New Haven Jewish community through newly established and increased Perpetual Annual Campaign Endowment (PACE) funds: \$1 million to be comprised of new PACE funds, and the other million dollars to be from additions to existing PACE funds.

WHAT IS PACE?

A **Perpetual Annual Campaign Endowment (PACE)** fund is a permanent endowment fund of the Jewish Federation of Greater New Haven established in your name to perpetuate your annual commitment to the Federation's Annual Campaign. As an endowment fund, principal is not touched and the fund is invested with the Jewish Foundation of Greater New Haven. Each year, the interest earned from the fund is distributed to the Federation's Annual Campaign. The annual distribution will be made in perpetuity in your name.



Did You Know: A Women's Philanthropy gift can also be endowed as a special type of PACE fund called a LOJE (or Lion of Judah Endowment)!

HOW DOES IT WORK?

Anyone can start an endowment fund, no matter your financial situation. The minimum amount required to start a fund is \$10,000, but it doesn't need to be fully funded up-front. An endowment

can be funded over time through periodic donations (a great way to mark a milestone or special occasion!) or with a single gift. Donations can be made in the form of cash, stock, and/or planned gifts such as a bequest in your will, or an IRA or life insurance designation.

The money contributed is used to establish a Perpetual Annual Campaign Endowment fund in your name. The fund is invested in Federation's Endowment Foundation for long-term growth. Each year, a distribution is made from your PACE fund to Federation to perpetuate your annual support.

"PACE is insurance for the community. Without it, the future of the community promises to be very, very challenging."

WHY SHOULD I OPEN A PACE FUND?

Reason #1: PACE Funds Account for a Sizeable (and Growing!) Portion of Federation's Annual Campaign

When David and Ruthann Beckerman first helped launch PACE in the Greater New Haven community back in 1999, PACE fund disbursements accounted for just under \$20,000 towards a \$3.17 million annual campaign, or a little more than 0.6% of all donations to that year's campaign.

Last year, PACE funds paid out \$517,000 into a \$2.39 million campaign, or nearly 22% of all monies raised! And if you start a PACE fund today, we can ensure that number continues to grow to provide a strong foundation for our community's future.

Reason #2: Starting a PACE Fund Is a Win-Win Scenario!

When you open a PACE fund at the Jewish Foundation, not only does it provide benefits to the Jewish community for decades to come, it also benefits you! Here are some of the ways:

- **Recognition.** You are recognized as a PACE donor when you announce your commitment to make this enduring gift.
- **Tax Benefits.** You may receive estate and/or income tax benefits depending on your specific situation and the funding method chosen.
- **Impact.** Your gift will generate future income to support Federation.
- **Values.** This gift makes a statement to your children and grandchildren about your Jewish values and commitment to Jewish life and continuity.

HOW DO I ESTABLISH A PLANNED OR LEGACY GIFT?

There are a variety of vehicles you can use, such as securities, retirement plan assets, real estate, charitable gift annuities, charitable remainder trusts, and gifts of life insurance.

Here are just some of the options available to you:

- Donate cash or securities during your lifetime
- Leave a gift to Federation in your will
- Gift a new or existing life insurance policy by naming "Federation" as owner and beneficiary of the policy
- Complete a "Beneficiary Designation Form" with your IRA administrator which lists Federation as a beneficiary
- Include Federation as a charitable beneficiary of your Donor-Advised Fund after your lifetime

CAN THE FEDERATION WORK WITH MY FINANCIAL ADVISORS?

Absolutely! It's important to consult with your financial advisor before making any planned or legacy gifts. In partnership with the Jewish Foundation of Greater New Haven, Federation will work with you and your professional advisors to plan a gift that achieves your personal financial and charitable goals. We are available to meet and consult with you and your advisors throughout the process.

"It's a question of priorities. Our priority is to ensure the future of our Jewish community. What we need to do is to build a very stable and strong foundation. And that comes from an endowment fund."

THESE FAMILIES HAVE MET THE BECKERMAN FAMILY PACE CHALLENGE

(as of 1/26/2023)

- Norman & Caron Alderman**
- Richard Amerling**
- David & Karen Astrachan*
- Rosalind & Stephen Atkins*
- Steve & Judy August*
- Gerry & Debbi Barker*
- Brad Beckerman**
- Linda & Leonard Bell*
- Rob & Stacey Bland*
- Richard Brodner*
- Mark & Linda Caplan*
- Nancy Cohen*
- Rhoda Cohen*
- Jody Ellant**
- Rick & Debbi Epstein*
- Dale & Robert Felice**
- Emily Fine & Stephen Stein*
- Andrea & Steven Fleischman*
- Claire Frankel**
- Suzanne Gallant**
- Dena Schulman-Green & Eric Green**
- Betsy & Jeffrey Hoos**
- Cari & Keith Kaplan**
- Edward Konowitz*
- Jackie Koral*
- Bill Loftus*
- Lisa Martin**
- Hap & Stacey Perkins**
- Jodi & Richard Pollack**
- Paul & Rita Portnoy*
- Eric Ravid**
- Stephen Saltzman**
- Shirley Scholder**
- Jimmy Shure**
- Susan & Doug Skalka*
- Mark & Judy Sklarz**
- Jeffrey & Robyn Teplitzky*
- Barry & Hyla Vine**

*= new fund established

**= added funds to existing PACE/LOJE

SID AND DONNA LEVINE FUND IN MEMORY OF MORRIS LEVINE AND MAX ROMANOFF for the benefit of the Jewish Historical Society Established at the Jewish Foundation.

Donna and Sid Levine established a new fund at the Jewish Foundation of Greater New Haven in honor of and in memory of their fathers, Morris and Max. The fund was established to support the important work of the Jewish Historical Society, including maintaining and expanding its extensive archives and providing community educational programs.



“As a third generation New Havener, I appreciate the Society’s remarkable fifty-year history of documenting Jewish stories and lives. My father, Morris Levine, and Donna’s father, Max Romanoff, were both World War Two Veterans who worked together at Chepovsky’s Food Market on Legion Ave. When Max was dating Estelle Gold he took Morris to meet her. Estelle became Donna’s mother. Both Morris and Max had a lot of affection for New Haven and its Jewish History. The fund is named in honor of Morris and Max,” explained Sid Levine.



2023 SCHOLARSHIP OPPORTUNITIES

COLLEGE SCHOLARSHIPS

The Jewish Foundation offers needs-based and needs-blind scholarships for high school seniors from Jewish households. All applications must be completed online by May 15, 2023. All applications are confidential and anonymously reviewed. Awards range from \$500 to \$3,000.

This is a competitive application process. Most years there are more applicants than money available. Therefore, awards are based on the strength of the application.

SYNAGOGUE SCHOOL SCHOLARSHIPS

The Jewish Foundation offers needs-based assistance for New Haven area synagogue schools. The deadline for the online application is October 2, 2023.

ONE HAPPY CAMPER

The Jewish Foundation offers needs-blind incentive grants for first-time campers to Jewish overnight camp and needs-based aid for first-time and returning campers.

There are over 200 traditional and specialty Jewish overnight camps to choose from. Application deadline is June 9, 2023.

ISRAEL EXPERIENCE SCHOLARSHIPS

The Jewish Foundation Israel Experience Program enables Jewish students, ages 15–20, the opportunity to participate in an Israel experience to develop, enrich, and reinforce their Jewish education and identity.

Scholarships are for short-term (minimum of 3-week program) and long-term organized Israel educational programs. For 2023 summer trips, applications are due by April 7, 2023. For 2023 gap or academic year programs, applications are due by June 9, 2023.

An essay and 2 recommendations are required. All applications are confidential and anonymously reviewed by the Israel Experience Scholarship committee. These scholarships are needs-blind.

This is a competitive application process. Most years there are more applicants than money available. Therefore, awards are based on the strength of the application.

2022 FINANCIAL SUMMARY

Total Foundation Assets	\$71.9 million
Contributions (in gifts received)	\$2,930,773
Charitable Distributions/Grants	\$3,958,953

Top 5 Distributions

PACE Distributions to Federation Annual Campaign	\$519,247
Security Grants	\$287,400
Jewish Elderly Grants	\$219,000
Jewish Federation of Greater New Haven—Community Impact	\$174,750
Scholarships for Jewish Overnight Camps	\$29,700

82%

was distributed to local Jewish organizations and synagogues

\$3,245,196

For more information and applications, visit [jewishnewhaven.org/scholarships](https://www.jewishnewhaven.org/scholarships)

CREATE A JEWISH LEGACY



We all strive to leave the world a better place through

*our children,
our good deeds,
our generosity.*



SUSAN VOIGT
CREATED A LEGACY
FOR HER SYNAGOGUE,
CONGREGATION
BETH EL-KESER ISRAEL

Create a Jewish Legacy is a program sponsored and presented by the Jewish Foundation of Greater New Haven and is a collaborative effort of our area agencies and synagogues to secure the future of the New Haven Jewish community.

Create a Jewish Legacy for:

Jewish Federation of Greater New Haven (PACE)
Temple Beth Tikvah
Beth Israel Synagogue
Westville Synagogue
Congregation Mishkan Israel
Temple Beth David
Congregation Or Shalom
Temple Beth Sholom
Temple Emanuel
Congregation Beth Shalom Rodfe Zedek
Congregation B'nai Jacob
Congregation Beth El-Keser Israel

Orchard Street Shul
Jewish Family Service
Camp Laurelwood
Towers at Tower Lane
Ezra Academy
Southern Connecticut Hebrew Academy
Jewish Community Center of Greater New Haven
UConn Hillel
Jewish Cemetery Association of Greater New Haven
Jewish Historical Society of Greater New Haven
New Haven Mikveh Society



I am excited to leave a two-fold legacy. My greatest legacy is having 3 children and now 7 grandchildren. As the daughter of Holocaust survivors, I can say, 'We live on! We thrive!' My second legacy is to my shul, Congregation Beth El-Keser Israel. I created a legacy for BEKI in my estate plans so that it can continue to be a place for families to learn and grow.

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Jewish Foundation
OF GREATER NEW HAVEN

*Be forever remembered by our community
for the legacy you leave.*

Make YOUR legacy a brighter Jewish tomorrow.





Jewish Foundation
OF GREATER NEW HAVEN

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OPEN A DONOR-ADVISED FUND WITH THE JEWISH FOUNDATION

Think of a donor-advised fund as your charitable bank account. When you contribute cash or securities to your DAF, you are eligible to take an immediate tax deduction. Those funds can be invested for tax-free growth, and you can recommend grants to any IRS-qualified public charity over time.

- 1 Establish a special charitable fund in your name with the Jewish Foundation.
- 2 Contribute cash or appreciated securities.
- 3 Foundation sells the assets and credits your fund with the sale proceeds.
- 4 You receive a tax receipt for charitable deduction purposes—no capital gains taxes are payable.
- 5 The proceeds are invested and continue to work for you, tax free.
- 6 Request distribution to qualified charities—at your convenience.