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**Want to know more about how Donor Advised Funds work?**

Watch our new animated video at [www.jewishfoundationla.org/donor-advised-funds](http://www.jewishfoundationla.org/donor-advised-funds) and share with your friends.



Sixty-six years ago, a small group of visionary community leaders came together to create a conduit of philanthropic resources that people could rely on in both good times and in times of crisis. Back in 1954, no one could have imagined what the future held. Yet these wise leaders knew our community needed a pillar of strength and stability to weather the inevitable storms that would come our way.

Thus, the Jewish Community Foundation of Los Angeles was born. From a meager beginning of just several donors and a few modest grants, we are today a \$1.3 billion foundation with 1,300 donor families. Most significantly, we and our donors have distributed more than \$1 billion in grants in the past 13 years.

Over the decades, we have been called upon to lend a hand in difficult circumstances such as the relocation of thousands of Soviet Jews to our community, the AIDS crisis, the Great Recession of 2008, as well as Operations Moses and Solomon airlifting Ethiopian Jews

**“Our founders could never have imagined this crisis, yet they created an ideal vehicle decades ago to confront it now.”** —Marvin I. Schotland

to Israel, to name a few. But none compare to what we face today: a ruthless and deadly virus wreaking havoc on our community, our country, and throughout the world. Our founders could never have imagined this crisis, yet they created an ideal vehicle decades ago to confront it now.

Soon after the pandemic began, we committed \$8.3 million of Foundation resources to counter the effects of this disease locally and in Israel. It's by far the most money we have ever directed to one cause. And inside this issue, you'll read about our most recent allocation of \$3 million.

Just as our founders exemplified visionary leadership, so too does our current Board of Trustees admirably guide us and inspire us as we navigate these difficult circumstances.

However, our extended family of dedicated donors truly make possible all that we're able to accomplish today—and will achieve in years to come. You'll read about several of our cherished donors on the following pages, each of whom is playing a supporting role in addressing the pandemic. They represent our entire family of donors who contributed \$5.5 million to COVID-19 relief so far, which we are most grateful for.

May the magnitude of this support bring hope and inspiration to you, your families, and all your loved ones—and the realization that we as a community will ultimately prevail over this disease. ✧

**Marvin I. Schotland**

President & CEO  
Jewish Community Foundation  
of Los Angeles

“We’re focused on supporting organizations that are caring for the most vulnerable this winter.”

## New Donors in an Uncertain Time...

There are many reasons donors turn to The Foundation as their partner in charitable giving, now more than ever.

Meet four new members of our donor family and hear their different pathways to philanthropy by connecting with us.

If you’re not yet counted among The Foundation’s family, we invite you to explore with our experts how you can give more strategically through a Donor Advised Fund.

### Jeremy Barnett

A Calabasas resident, **Jeremy** is the chief marketing officer for Cyberscout, a cybersecurity services company. The Barnett family has been connected to The Foundation for many years, as Jeremy’s aunt, Marilyn Mars, was once a member of the staff. Giving through The Foundation is still a family affair, as his three kids, in their late teens and early twenties, are directly involved in making philanthropic decisions.

#### Q: What is the value of opening a Donor Advised Fund?

One of the great benefits of setting up a Donor Advised Fund with The Foundation is the ability to set up multiple funds with the kids. Helping them channel their passion for social action, and enabling them to manage their own



Jeremy Barnett and his children, Ava, Maia, Jacob

funds and giving, has been a great learning experience for all of us. Not only are my kids challenging themselves to identify organizations they wish to support, but they have also recognized how the Jewish community has created this important mechanism to optimize giving and, most importantly, the impact of their *zedakah*.

#### Q: What is your area or areas of charitable passion?

Organizations within the Jewish community that are doing great work have been my focus. Camp Ramah, IKAR, and Impact Israel all have important missions, and I feel that supporting them and, in turn, their constituents, is most helpful.

#### Q: How has the global pandemic affected your giving strategy?

It has brought to light how important it is for individuals in the private sector to help each other. We’re focused on supporting organizations that are caring for the most vulnerable this winter.

### David Jacobs

**David** is a financial planner involved in the LA Jewish community and says The Foundation has an excellent reputation among his professional peers for offering effective and convenient vehicles to accomplish a variety of charitable giving needs. It is also well known for exceptional customer service and donor support. That’s why he turned to The Foundation to open the Jewish Business Leaders Charitable Fund.



David Jacobs

#### Q: What is your area or areas of charitable passion?

Predominantly Jewish causes serving our local community and Israel.

#### Q: Have you turned to The Foundation for guidance about your philanthropic goals?

I have turned to The Foundation for assistance researching potential charities as well as confirming receipt of gifts. The staff has reached out to me on occasion to clarify some of my charitable gifts, which I greatly appreciate.

“I really can’t emphasize enough how much I appreciate The Foundation staff and their willingness to understand my giving needs and make them a reality.”

#### Q: Has the global pandemic affected your giving strategy?

Absolutely. We are all well aware of the strain COVID-19 has put on certain segments of our society. In 2020 I adjusted and increased my giving accordingly.

#### Q: Do you have advice for others who want to become more strategic, effective, and informed philanthropists?

Whether you consider yourself a beginner or an experienced donor, The Foundation has the tools and experts to help design and implement a giving strategy to accomplish your current and future charitable goals. I really can’t emphasize enough how much I appreciate The Foundation staff and their willingness to understand my giving needs and make them a reality.



# Donor Spotlight

## Jane Jelenko

Jane was the first woman partner in the consulting arm of KPMG, the international professional services firm, where she served for 25 years. She retired in 2003 and now serves on several corporate and community boards. Her estate lawyer and her investment advisor both suggested she consider opening a Donor Advised Fund at The Foundation, but the deciding factor was a convincing discussion she had with a friend who extolled the value of working with The Foundation to achieve her philanthropic goals.



Jane Jelenko

### Q: What is your area or areas of charitable passion?

I have several interests including dance and the performing arts, education, the US Holocaust Memorial Museum, Israel, progressive organizations, and homelessness.

### Q: Has the global pandemic affected your giving strategy? How?

Yes, I have deepened my commitment to my regular charities affected by COVID-19. So many organizations are struggling right now, and I feel it's important to increase my support at this difficult time.

### Q: Have you turned to The Foundation for guidance about your philanthropic goals?

The Foundation has helped guide me how to most strategically structure my giving. The breadth of expertise has been invaluable.

### Q: What can you say to others who want to become more strategic philanthropists?

Make sure to align your giving with your values and interests. Keep focused on how your donations are having a meaningful impact through the organizations you support. Make sure the organizations are well-run and keeping their administrative expenses in check.

*The Foundation has helped guide me on how to most strategically structure my giving.*

## Raphael & Sasha Morozov

Raphael and Sasha are first-generation immigrants from the former Soviet Union who came to the United States when they were kids. The warmth and generosity of the Jewish community that welcomed them with open arms had a tremendous impact on their worldview. Raphael is a technology leader, and Sasha has dedicated her career to social work and the nonprofit world, where she sees firsthand the impact of philanthropy.

### Q: Why did you open a Donor Advised Fund at The Foundation?

Because we understand the value of *tikkun olam* and the importance of having an impact, which are core values for us. The desire to make philanthropy a long-term commitment inspired us to open a Donor Advised Fund at The Foundation.



Sasha and Raphael Morozov with their sons Jacob and Benji.

### Q: What is your area or areas of charitable passion?

We are focused on poverty, Jewish nonprofits, American veterans, and Friends of the Israel Defense Forces (FIDF). We believe that everyone should have a shot at the American dream.

### Q: How has COVID-19 affected your giving strategy?

This year has been like no other, and the level of need is like no other. We have focused on providing a wider safety net and contributing to agencies who are working with those that are most affected by the pandemic.

### Q: Advice for others who want to become more strategic/effective/informed philanthropists?

To make the most impact, one must not simply donate but think outside the box, mentor, and volunteer. This is the way to build a legacy of giving, caring, and long-term involvement in the betterment of the community, the country, and the world.

*To make the most impact, one must not simply donate but think outside the box, mentor, and volunteer.*

## Our Development Experts

As the year comes to a close and you reflect on your achievements in 2020, please consider how a Donor Advised Fund could help you better achieve your charitable goals. It's a wonderful way to conclude the year! To learn more, please visit [www.jewishfoundationla.org](http://www.jewishfoundationla.org), call our Development Department at 323.761.8704, or email [development@jewishfoundationla.org](mailto:development@jewishfoundationla.org).



Steve Gamer, Vice President, Advancement



Natella Royzman, Director, Charitable Gift Planning



Dan Rothblatt, Executive Vice President



# New COVID-19 Grants

## \$3 Million in New COVID-19 Grants Awarded

In late November, \$3 million in grants was awarded in Phase II of The Foundation's comprehensive COVID-19 relief efforts. These grants will help sustain local Jewish nonprofits experiencing economic hardship from the pandemic, provide day school and camp scholarships for children, and address urgent needs in Israel.

### Sustainability of Local Jewish Nonprofits – \$1.5 Million

The COVID-19 crisis impacts our entire Jewish communal landscape. Nonprofits are experiencing a decrease in fundraising with a simultaneous increase in demand for services. Sixteen organizations—all former or current Foundation grant recipients—were awarded grants totaling \$1.5 million to help ensure their viability through these difficult times. They represent a wide array of focus areas:

#### ARTS & CULTURE

- theatre dybbuk

#### COLLEGE/GRADUATE STUDENTS

- Hillel 818
- Hillel at UCLA
- Jewish Graduate Student Initiative
- USC Hillel



Foundation grantee, JQ International

#### COMMUNITY ENGAGEMENT

- Pico Union Project
- Silverlake Independent Jewish Community Center

#### EDUCATION

- Builders of Jewish Education

#### INDIVIDUALS WITH DISABILITIES

- Friendship Circle
- The Miracle Project

#### ISRAEL ADVOCACY

- Fuente Latina

#### TEEN & YOUNG ADULT ENGAGEMENT

- 30 Years After
- Honeymoon Israel
- Moving Traditions

#### VULNERABLE POPULATIONS

- Jewish Big Brothers Big Sisters of Los Angeles
- JQ International

### Support of Camps and Day Schools – \$1 Million

A key goal of these new grants is to strengthen Jewish families. According to **Lori Klein**, vice president of

Note: Photos were taken pre-COVID-19.

The Foundation's Center for Designed Philanthropy, "A portion of our grants will help families address their children's needs because when we strengthen families, we strengthen our community." To that end, \$1 million was awarded to the Jewish Federation of Greater Los Angeles to support its longstanding scholarship program for Jewish camps and tuition assistance program for day schools. By pooling our resources with the Federation's, we are ensuring our grants will have a greater impact on families in need.

### Addressing Critical Needs in Israel – \$500,000

Unemployment, food insecurity, paramedical care, and the welfare of at-risk youth are among the most pressing issues in Israel today. A total of \$500,000 in grants is being directed to two large organizations with deep experience addressing these areas across Israeli society. They are the **American Jewish Joint Distribution Committee (JDC)** for its efforts to address employment assistance and provide support for at-risk youth, and **Latet** for its work in providing food and paramedical assistance for low-income families and Holocaust survivors.

### A Total Commitment to COVID-19 Relief

In July, The Foundation announced an \$8.3 million grant initiative redirecting its entire 2020 institutional grantmaking to pandemic relief. The first phase of our COVID-19 grants provided \$2.5 million in immediate relief to 22 local nonprofits addressing vital needs. In addition to the \$3 million in grants awarded in November, as needs evolve over time, up to \$2.8 million more will be distributed in 2021 for pandemic relief locally and in Israel.

### Donors Respond in Kind

Our remarkable donor family has directed nearly \$5.5 million for COVID-19 relief primarily from their Donor Advised Funds and Family Support Organizations since the pandemic began. This translates into 431 grants to more than 150 nonprofits. When these donor grants and The Foundation's COVID-19 grants are tallied together, the amount directed for pandemic relief is \$13.8 million.

## \$13.8 MILLION IN COVID-19 SUPPORT

**\$8.3 million: Foundation Grants**  
**\$5.5 million: Donor Grants**



We offer our deepest gratitude to everyone who has made possible these vital COVID-19 Response Grants that are helping thousands of people during these painful times locally and in Israel. ✖

## New Racial Equity Grants Awarded

The Foundation recently awarded grants totaling \$325,000 to seven organizations addressing racial equity. The grants will help fund programs that span a diverse range of areas including health care for Black women and infants, job opportunities for at-risk youth and those exiting the justice system, access to quality education, and leadership opportunities for Black professionals.

“With The Foundation’s support, we are able to expand our housing services with two more safe houses during the pandemic for the women we serve.” —Susan Burton, Founder and Executive Director, A New Way of Life

### A NEW WAY OF LIFE REENTRY PROJECT

Provides women exiting prison (primarily women of color) with a safe, welcoming, and structured place to stay, education and employment opportunities, case management, and legal services as they reenter the community.

[www.anewwayoflife.org](http://www.anewwayoflife.org)



### AFRICAN AMERICAN BOARD LEADERSHIP INSTITUTE

Trains and places well-qualified African American professionals on boards across a number of well-known public institutions, recognizing the need for more equitable representation among corporate, nonprofit, and government boards and committees.

[www.aabli.org](http://www.aabli.org)



### ANTI-RECIDIVISM COALITION

Works to end mass incarceration and reduce recidivism rates in California through justice-reform advocacy, re-entry support, mentoring, counseling, and housing. Its **Career Development Program** works to provide stable, long-term careers for its members, as one of the most difficult parts of re-entering the community is access to work.

[www.antirecidivism.org](http://www.antirecidivism.org)



### JEWES OF COLOR INITIATIVE

Works to advance and build the professional, organizational, and communal field for Jews of color. This includes commissioned studies on the number and experiences of Jews of color in the U.S., as well as working to promote racially diverse engagement, and grantmaking to support diversity, equity, and inclusion.

[www.jewsofcolorinitiative.org](http://www.jewsofcolorinitiative.org)



### BLACK WOMEN FOR WELLNESS

Is committed to the health and well-being of Black women and girls and focuses on research, education, outreach, and leadership development of Black women to address the health challenges in their communities, where infant mortality and maternal death during childbirth run two and four times higher, respectively, than among white women regardless of socioeconomic status.

[www.bwwla.org](http://www.bwwla.org)

### LOS ANGELES BROTHERHOOD CRUSADE

Focuses on addressing the unmet needs of low-income, underserved, and disenfranchised individuals through initiatives such as its **Youth Development Program**, which provides comprehensive services – mentorship, gang prevention, educational support, and career readiness – for at-risk youth and students.

[www.brotherhoodcrusade.org](http://www.brotherhoodcrusade.org)



### SOCIAL JUSTICE LEARNING INSTITUTE

Is dedicated to improving the education, health, and well-being of youth and communities of color across Inglewood, Compton, Watts, Lennox, Lancaster, and Palmdale through its **Urban Scholars Program**, which aims to increase students’ academic achievement and provide them tools and resources to advocate for an equitable education. ✦

[www.sjli.org](http://www.sjli.org)

“This grant will help us continue impacting youth in South LA by providing technical assistance, life skill classes, enrichment programs, and career pathways leading to sustainable earning jobs, careers, and continuing education.”

—Charisse Bremond-Weaver, President & CEO, Los Angeles Brotherhood Crusade

To learn more, visit [www.jewishfoundationla.org/grantees](http://www.jewishfoundationla.org/grantees).



## Online Series Draws Virtual Crowds

Our popular Online Donor Salon Series continued over the summer and fall with a wide range of enriching and informative sessions. During this time of isolation, our community of donors is drawn together to engage in self-reflection and inspired learning. Here's a sample of what we experienced:



### *Getting Good at Getting Older*

Rabbi Laura Geller, in conversation with Dr. Pinchas Cohen, dean of USC Leonard Davis School of Gerontology, explored topics such as the nature and value of friendships as we age and what "leaving a legacy" truly means. Rabbi Geller is co-founder of ChaiVillageLA, a Foundation grantee, and is the author of *Getting Good at Getting Older*.

“It’s important to use this time to cultivate an inner life so that the isolation doesn’t become debilitating.”

“Leading a life of legacy is about staying in tune with the beauty of the gift of the light inside of us, and sharing that light with the world.”



### *How Do You Want to Be Remembered? Creating a Life Legacy*

Rabbi Daniel Cohen offered guidance on being your best self every day and fostering a legacy that you’re proud to leave behind. Rabbi Cohen is the author of

*What Will They Say About You When You Are Gone? Creating a Life of Legacy.*



### *Israel: The Start-Up Nation 2.0 – My Personal Journey to Philanthropy & Innovation*

Eric Benhamou, founder of Benhamou Global Ventures, walked us through his personal history, revealing what led him to become a successful entrepreneur and “venture philanthropist.”

“Israel, the startup-nation, has been the only country in the world, up until recently, to rival Silicon Valley, in terms of entrepreneurial intensity and success in venture capital.”

“... May your legacy letters broaden understanding and compassion for you and your loved ones and for the sake of future generations.”



### *Writing Meaningful Legacy Letters: An Opportunity and Responsibility in This Pivotal Moment*

Rachael Freed, distinguished author, trainer, and founder of *Life-Legacies*, inspired participants with personal and moving stories about ethical wills and legacy writing. Her latest book is *Your Legacy Matters: Harvesting the Love and Lessons of Your Life: An Intergenerational Guide for Creating Your Ethical Will*.

“The potential is extraordinary for families to tap into their own innovative cultures. It’s important to be a ‘learning family’ in the midst of a complex world.”



### *Financial Fluency in Families in the Context of Pandemics, Social Justice, and Change*

An intimate and dynamic conversation between Joline Godfrey, financial education expert and author of *Raising Financially Fit Kids*, and Naomi Strongin, associate director of our Center for Designed Philanthropy explored how families can engage together in meaningful philanthropy and develop financial mindfulness. ✦



### *Creating Certainty in Uncertain Times: How Endowments Link Past, Current, and Future Generations*

Foundation Trustee Abby Feinman of Katten Muchin Rosenman LLP, joined Foundation experts Steve Gamer and Natella Royzman to discuss the value and process of creating a meaningful endowment as a lasting legacy that endures in perpetuity.

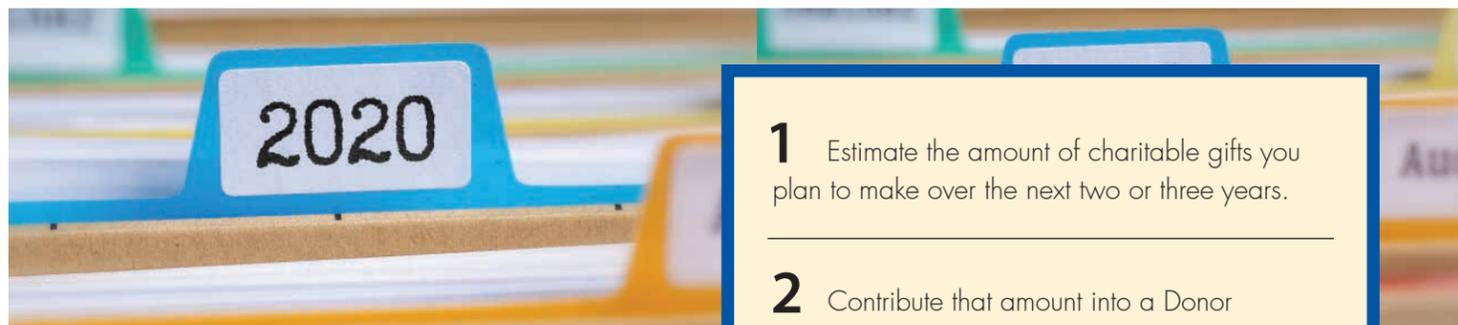
“Endowments ensure that the causes meaningful to us are sustained beyond our lifetimes.”

Look for invitations to our next Online Donor Salons in 2021!





## Year-End Tax Planning Tip: Charitable Gift Bunching Using Donor Advised Funds



Every year you (or someone on your behalf) decide whether to itemize deductions on your income taxes or take the standard deduction. To justify itemizing, your total deductions for the year need to exceed the applicable standard deduction, which was increased under the new tax law to \$12,400 for individuals and \$24,800 for joint filers.

Without getting into the complexities of tax law, here is what's important to understand: The increase in the standard deduction, combined with the reduction or elimination of many itemized deductions, means that most people will no longer be itemizing. And without itemizing on your 2020 tax return, you won't be able to claim any tax benefit for your charitable giving.

Fortunately, there is a simple four-step strategy called **bunching** that you can use to retain your charitable tax deduction. If you are charitable and would otherwise be taking the standard deduction on this year's tax return, following these steps allows you to maintain your normal giving patterns while preserving your full charitable tax benefits. This is a win-win for both you and the causes you care about, which will benefit from continuing to receive consistent contributions.

**1** Estimate the amount of charitable gifts you plan to make over the next two or three years.

**2** Contribute that amount into a Donor Advised Fund (or DAF), an easily established charitable giving account that can be opened with contributions as low as \$5,000 at The Foundation.

**3** Claim a charitable deduction for the entire contribution made to your DAF on the current year's tax return. Your contribution to a DAF qualifies as a charitable deduction while you maintain a high degree of discretion to recommend gifts from it to charities of your choice on your timeline.

**4** Continue your regular giving from your DAF and take the standard deduction on your tax return in the subsequent year or two.

Using a DAF for bunching provides you the greatest flexibility and helps nonprofits maintain the stability needed for their important work in our community. Establishing a DAF at The Foundation is a simple, straightforward process. To learn more, please visit [www.jewishfoundationla.org](http://www.jewishfoundationla.org), call us at 323.761.8704, or email [development@jewishfoundationla.org](mailto:development@jewishfoundationla.org). ✨

## Conversations with Our Donors: Jessica Nadel & Josh Feffer

by Steve Gamer, Vice President of Advancement



Josh Feffer and Jessica Nadel established a Donor Advised Fund (DAF) in 2015. Josh is a geologist and founder of Feffer Geological Consulting, which ensures structural integrity in homes and buildings. Jessica was a longtime educator who served as assistant director of Kehillat Israel school in Pacific Palisades, among other roles. Twenty years ago, when their two children – Jake and Olivia – were young, they joined a Jewish Federation young couples' initiative, ultimately leading to a deeper commitment to *tzedakah*. Josh was encouraged by former Foundation Trustee Brian Shirkin to become involved in the Federation's Young Leadership Division, which led to him to join their National Young Leadership Cabinet.

As their children grew, Jessica became more involved on several nonprofit boards, serving on an endowment fund committee that helps children of Brentwood Country Club employees attain their educational goals. They're passionate about the Jewish community and a range of causes, including social justice, the Harold Robinson Foundation – which builds bridges between diverse student groups through summer camp – and Partnership LA's efforts to transform inner-city schools. Here are highlights of a recent conversation with Josh about his family's charitable pursuits:

### Where do you get your passion for philanthropy?

I love Judaism, our traditions, and being part of a people that has been doing good for so long. I love implementing positive change and believe that giving to charity should be fun and eye opening, so that's how I approach it!

### How did you get involved with The Foundation and decide to open a DAF?

A good friend had a DAF and really enjoyed it, and the idea of being able to manage our charitable giving more effectively appealed to me. Making donations into our "charitable bank account," getting an immediate tax deduction, and then disbursing the resources over time made a lot of sense.

### What impact has your fund made on your children?

Our kids – now 22 and 23 – have gotten more involved in philanthropy through our fund and manage some of the grants. For example, when they were in high school, we gave them each \$500, and they met with experts at The Foundation to determine how best to direct the money. Recently, our family decided to make several social justice grants, and this experience gave our kids a feeling of empowerment that they were making an impact. I love the fact that our DAF is perpetuating a legacy of giving in our family!

### Your advice for aspiring philanthropists?

To be a better person, you need to spend time and capital giving back for the greater good and those less fortunate. We have such a dynamic landscape of charities right here in LA, and any cause you choose will be a good choice. Just do it intelligently and with passion. ✨



The Feffer-Nadel Family (l to r): Olivia, Josh, Jessica, Jake



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## His Star Shines Brightly

We salute **Dan Rothblatt**, executive vice president of The Foundation, on receiving the inaugural **Shining Star Award** bestowed by



National Philanthropy Day Los Angeles in mid-November. The award was presented by longtime friends and former colleagues **Rabbi Gary** and **Tamara Greenebaum**, who paid tribute to Rothblatt's 30-plus years of work in nonprofit development across the Jewish and general communities in Los Angeles. Over the past 13 years, Dan has played a vital role in helping increase our assets to \$1.3 billion and attracting hundreds of new donors to

The Foundation, helping philanthropists fulfill their charitable passions. Congratulations, Dan! ✨

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Please send your comments and suggestions to the editors.

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**Every year, we plant trees in Israel through the Jewish National Fund to offset our carbon footprint.**

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