

Our Jewish Legacies

Spring-Summer 2008

Tax, Estate and Charitable Planned Giving Opportunities

Tzedakah from Generation to Generation

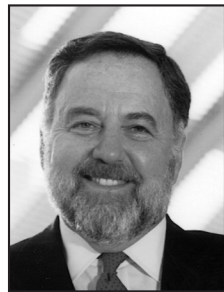
Like so many families are doing, you too can Create Your Own Jewish Legacy. Create a Jewish Legacy* is based on fundamental themes important to all of us: family, community and continuity. There is no better place to teach the concepts of giving back to the community and helping those in need than in the family.

Tzedakah is more than philanthropy. Tzedakah is not only a generous, magnanimous act—it is also an act of justice and righteousness. Tzedakah makes a difference.

The Dallas Jewish Community Foundation's Donor Appreciation Event on March 31st, 2008, highlighted the commitment that many families have made through bequests and endowments. The keynote speaker, Morton H. Meyerson, shared that he learned about the importance of giving from his parents, and has passed the tradition of Tzedakah on to his children and grandchildren. Ruthy and Steven Rosenberg, well known leaders in our community who attended the community-wide celebration, have a Donor Advised Fund with the Dallas Jewish Community Foundation; they have also provided for the future of our community through a bequest commitment. Ruthy is Vice-Chairman of our Foundation.

Another example of living

the Tradition and passing it on to children and grandchildren is exemplified by Maxine Waldman and her children and grandchildren. The Waldman family matriarch,



Morton H. Meyerson

Maxine Waldman, is a great lady; and Tzedakah and family are her passions. She has volunteered at Presbyterian Hospital for over 36 years and continues to do so! Her husband, Erwin Waldman (of blessed memory), was a driving force in creating a family passionate about Tzedakah. In addition to being a Past JCC president, he was involved in many community charitable organizations throughout his life.

Every week, Maxine would tie a nickel in a hanky for her daughters, Carol Gene and Cherie, to take to Shul—this has made a lasting impression on both of them. Carol Gene and her husband, Howard Cohen, are Fundholders with the Foundation. They're grateful they have been able to experience the example of giving from their parents and, like Morton Meyerson, they've passed the tradition of Tzedakah to their children. "Howard and I feel that whenever our families arrived in this country they were fortunate to

be aided by the Jewish Communities where they settled." Howard sits on the Foundation's Executive Committee and on our Professional Advisory Committee.

In 2004, Howard endowed Carol Gene's Lion of Judah gift in honor of their 40th anniversary. "Years ago, I told Howard that it was important to me that I contribute in my own name," she said. "His gift, an acknowledgement of my commitment as an individual, is one I will always cherish."

Carol Gene's sister, Cherie, endowed her Lion of Judah gift this year. She and her husband, Dr. Neal Small, have been philanthropic throughout their marriage. Neal has also endowed his gift to the Jewish Federation of Greater Dallas through a Perpetual Annual Campaign



Steven and Ruthy Rosenberg



The Cohen-Small-Waldman Family

Endowment Fund. Neal also finds time to be on the Board of Directors of the Dallas Opera and chairs the advisory committee of the College of Visual Arts and Design at the University of North Texas.

Maxine's son, Steve Waldman, is just as motivated to give back. Steve and his wife, Jackie, are both committed to the Jewish community: "The driving cause behind our giving is to ensure the continuity of the Jewish people, to contribute to the healing of the world and to share the blessings we have received," say Jackie and Steve. Steve is a past president of the Jewish Federation of Greater Dallas and the President-Elect of the Dallas Holocaust Museum. They have both endowed their gifts to the Jewish Federation of Greater Dallas, and like Maxine and Erwin, Z'L, and Carol Gene and Howard, have Donor Advised Funds at the Dallas Jewish Community Foundation.

The second and third generations of the Cohens and Waldmans have made their mark as well. Scott Cohen is a member of the Foundation's Professional Advisory Committee, with his father, Howard. In addition, Scott and his wife, Barbi, have

also recently established a Donor Advised Fund to streamline their charitable giving.

Maxine's grand daughter, Kay Ellen Pollack, has served on the board of the Jewish Federation of Greater Dallas. Her husband, Jake, is a past president of Ronald McDonald House. Michael Waldman, at age 28, is the incoming Chairman of the Foundation's Scholarship Committee. He is also the new President of the Dallas Jewish Historical Society. Nicole Small, daughter-in-law of Cherie and Neal, is the CEO of the Museum of Nature and Science in Dallas. This organization has seen excellent growth and expansion under her leadership. Steve's daughter, Melissa Plaskoff is a past board member of the Dallas Holocaust Museum. Her husband, Bart, is a member of the Jewish Federation of Greater Dallas' Planning & Allocations Committee. Mark Cohen, who lives in Chicago, Illinois, is the chairman of the new LiveWell Foundation, which raises money for children and adults with special needs.

Personal resolve, an inspiring family and a world in need are powerful ingredients for the motivation to give back of our time, talents and resources.

The Dallas Jewish Community Foundation can help you Create Your personal Jewish Legacy that will benefit our community for generations to come. Please contact us at: 214-615-9351 or info@djcf.org for more information.

*Create a Jewish Legacy is a community public awareness campaign conducted by the Dallas Jewish Community Foundation and Jewish Federations and Foundations across the country. The goal of Create a Jewish Legacy is to make the Jewish community aware of how simple and meaningful it can be to leave a charitable legacy. The program promotes the message that each of us can make a difference in the lives of future Jewish generations.

Please delve further into our website: WWW.DJCF.ORG. Our website has several electronic brochures that may be of interest to you. Click on our e-publications tab to view them.

Learn the essentials of planned giving by exploring Planned Giving 101 on our homepage. There is a wealth of information on the many ways to create your legacy, plus informative feature articles such as "Savvy Senior," updates from Washington and donor stories.



LEAVE A LEGACY®