

SPECIAL ANNUAL REPORT ISSUE

July 1, 2020 - June 30, 2021

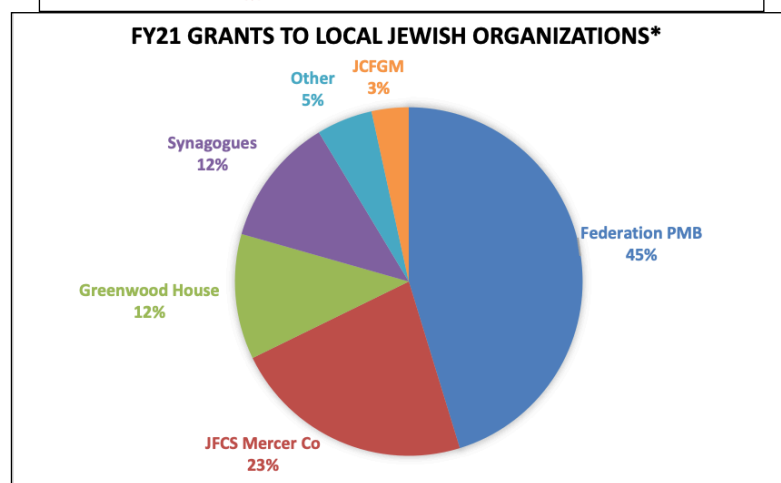
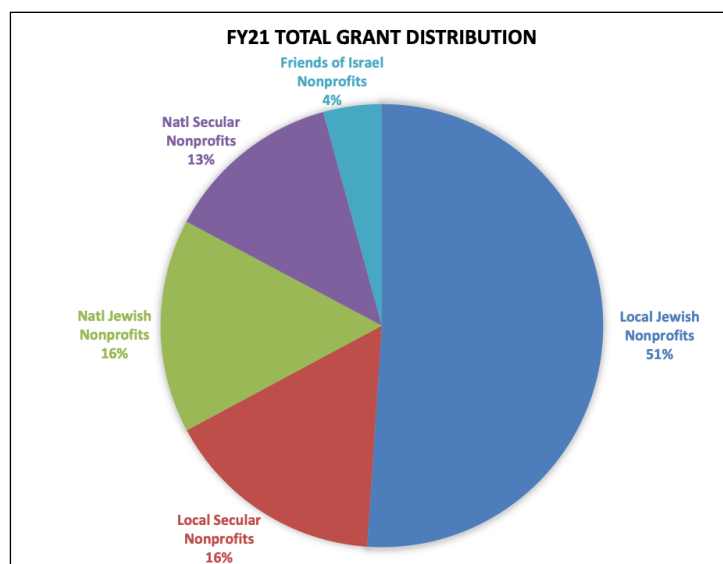
Year in Review

We are pleased to share with you the following highlights from 2020-2021 focused on our work as a trusted resource for charitable gift planning and as a leading partner in sustaining our Jewish institutions.

- ▶ Awarded more than 450 grants totaling over \$1,360,000 to local and national, Jewish and secular nonprofits. (See pie chart detail to the right).
- ▶ With Vanguard Institutional Advisory Services as our professional investment management team, the Foundation portfolio had a gross performance of 25.89%, compared to composite benchmark of 23.46%.
- ▶ Launched a partnership with neighboring region of Somerset, Hunterdon & Warren Counties, advising on a community LIFE & LEGACY program, which has secured 37 Promises (legacy commitments) to date.
- ▶ Record year for the Foundation in opening new funds, including funds established by the core agencies (Federation, JFS, JCC) in the Somerset, Hunterdon & Warren region.
- ▶ Served as a convener of cutting edge programs, providing important information to community members on topics ranging from *Jewish Ethical Wills*, *Forecasting Changes in the Tax Law*, and *The New American Judaism*.
- ▶ Provided ongoing leadership to LIFE & LEGACY partners and led two workshops on the *Roles of Board, Clergy and Staff in Legacy Giving* and *Building a Culture of Philanthropy*.
- ▶ Collaborated with the Hindu Jewish Coalition on approaches to charitable giving.

A Closer Look: Distribution of Grants

The Jewish Community Foundation manages 126 funds including Donor Advised Funds (DAFs), Restricted Funds and Custodial (Organizational) Funds. Fund holders have the opportunity to recommend grants to charitable organizations in the U.S. These pie charts provide an overview of the grant recipients in 2020-2021. If you don't already have a DAF and want to learn more, please contact us at 609-240-9511.



* FY21 grants to local Jewish organizations totaled \$696,795



Each of us has the power to secure the Jewish future. You took the first step by making a legacy commitment. Now reach out and ask someone to join you. Encourage them to reach out, too. Each one of us can make a difference.



Each One Reach One

Through a new LIFE & LEGACY campaign, called **Each One Reach One**, our Greater Mercer Jewish community is partnering with the Harold Grinspoon Foundation to increase the number of donors participating in the effort to secure the future of our cherished local Jewish organizations.

What can you do? If you have not yet made a commitment to your favorite Jewish organizations, please consider making a LIFE & LEGACY Promise today. And then, tell your story to another person and encourage them to join you. What motivated you to make a Promise to a particular organization? Why are you choosing to follow the tradition of planting seeds for the next generation?

What's the goal? Currently there are 610 legacy commitments to our Greater Mercer agencies and synagogues. Just imagine if those numbers were doubled!

To learn more about this campaign and how to use a Donor Advised Fund to fulfill your LIFE & LEGACY Promise, please contact Amy Zacks at amy@foundationjewish.org.

Installation of New Board of Trustees

At our Annual Meeting in June, the following Board of Trustees slate was approved, and we are pleased to recognize new officers and two new Trustees.

Chip Loeb, President
Harvey Fram, VP Investment *
Joanne Snow, VP Development
Michael Feldstein, VP at Large *
Joyce Kalstein, Treasurer
Miki Krakauer, Secretary *
Brenda Zlatin, Member at Large *
Scott Schaefer, Immediate Past President

Daniel Brent
Howard Cohen
Susan Falcon
Donald Leibowitz
Michael Manning
Jeffrey Miller
Jerry Neumann
James Schragger

Martin Schwartz
Alex Simanovsky
Joshua Waldorf
Tiffany Willner *
Marc Wisotsky
Walter Yosafat *

* New role on the Board