

# ANNUAL REPORT

LEGACY  
COMMUNITY  
ENDOWMENT  
RESOURCE

JEWISH  
COMMUNITY  
FOUNDATION  
of GREATER MERCER

FALL 2024 NEWSLETTER • FISCAL YEAR 2023-2024

## 2023-2024 BY THE NUMBERS

\$3mm



13.16%  
PORTFOLIO RETURN

824  
Total Life & Legacy Promises for Jewish organizations in the Greater Mercer and West-Central communities through FYE 2024

\$2.3MM  
FULFILLED PROMISES RECEIVED THROUGH FYE 2024

275 *Jewish and secular charities were supported through 650 grants totaling nearly \$1.7 million.*

62% *of these grants went to local organizations.*

## DEAR FRIENDS,

We are pleased to share the Jewish Community Foundation of Greater Mercer Annual Report for 2023-2024, a year of progress featuring increased assets managed, funds opened, grants disbursed, and Life & Legacy Promises made to our community. This report underscores our commitment to the mission of promoting philanthropy and sustaining our local Jewish institutions into the next generation.

In November, our Foundation will welcome Amy Zacks as our new Executive Director. As our Life & Legacy Coach and Director of Philanthropy, Amy has partnered with Linda Meisel in leading our Foundation's operations for more than six years. We look forward to Amy deepening her numerous positive connections with stakeholders throughout our Jewish community, and raising the visibility of the Foundation as a vital and trusted resource.

Finally, our Board of Trustees has set a challenge as we recognize Linda's commitment to our Jewish community. In honor of her 25 years of leadership, we will secure 50 new Promises before our community gathers again at the annual Life & Legacy Celebration in the spring. Follow Linda's inspiring example and make your own Promise to invest in building a stronger Jewish future.

Best wishes for a healthy, sweet, and meaningful new year.

*Chip Loeb*  
President

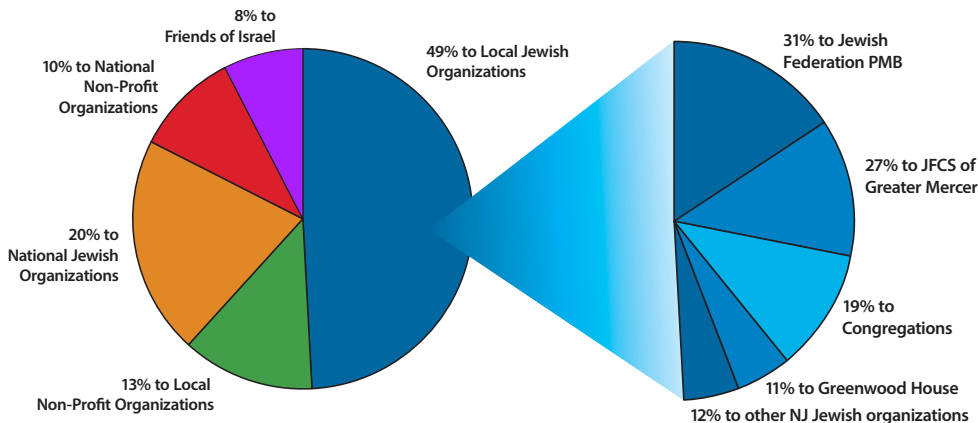
ONE MORE NUMBER:  
**SIXTY** years of helping individuals and families guide philanthropic resources to strengthen the Jewish and broader communities.

# 2023-2024 FUNDS & GRANTS

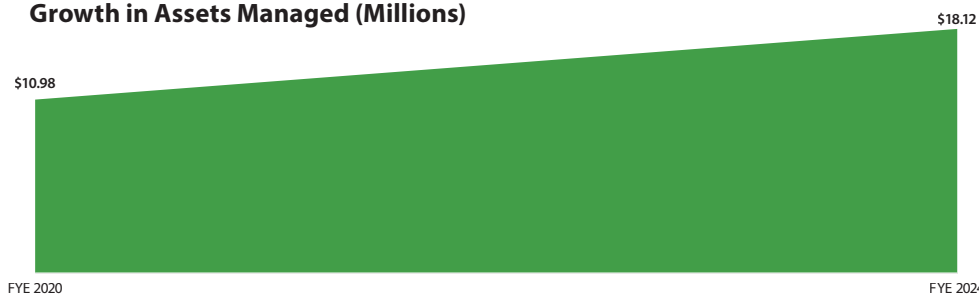
## Investing in Our Community

Our Foundation is proud to support numerous local nonprofits, most especially our partner agencies in the Jewish community. These dollars represent grants from restricted and donor advised funds at the Jewish Community Foundation. Our commitment to helping local Jewish organizations achieve financial security continues to be a top priority for the Foundation.

### \$1.7 Million in Grants Was Awarded



### Growth in Assets Managed (Millions)



## Board of Trustees 2024-2025

### Executive Committee

Chip Loeb, President  
 Harvey Fram, VP Investment  
 Joanne Snow, VP Development  
 Michael Feldstein, VP at Large  
 Joyce Kalstein, Treasurer  
 James Schragger, Secretary  
 Scott Schaefer, Past President  
 Susan Falcon,  
 EC Member at Large  
 Tiffany Willner,  
 EC Member at Large

Howard Cohen  
 Debra Harrison  
 Mark Janofsky  
 Stephanie Koren  
 Miki Krakauer  
 Michael Manning  
 Jeffrey Miller  
 Jonathan Nemeth  
 Norma Saks  
 Jill Schwartz-Chevlin  
 Joshua Waldorf  
 Marc Wisotsky

## The Future is Bright for our Jewish Institutions

Our vital Jewish organizations will be sustained into the next generation through Life & Legacy Promises.

A Promise secures after-lifetime giving to build the endowment of the beneficiary institutions you designate. During the year, two Life & Legacy workshops were presented to leaders representing local synagogues and agencies. They heard inspiring stories and learned proven strategies for growing legacy giving initiatives.



“The recent Life & Legacy workshop provided helpful tools and best practices to be successful in our own legacy giving initiative. We’re grateful to JCFGM for hosting these opportunities to deepen our understanding of ways to sustain our Jewish organizations.”  
 — Andrew Novick, Temple Sholom (Bridgewater)

# 2023-2024 REFLECTING ON SIXTY YEARS



# 2024-2025 SECURING THE FUTURE



## Invest Today in the Future of the Jewish Community

Join us in celebrating Linda's legacy of 25 years of leadership in our Jewish community. **Follow her lead and make your own Life & Legacy Promise today.** Visit <https://bit.ly/Digitalpromiseform>.

There's no better way to honor Linda for her extraordinary commitment than to pledge your investment in the future of our Jewish community. By making a Life & Legacy Promise, you're ensuring the longtime viability of the community she has worked selflessly to support and grow. Life & Legacy promises will sustain and grow our synagogues and Jewish agencies.

**Life & Legacy**  
ASSURE JEWISH TOMORROWS

At the 60<sup>th</sup> Anniversary Celebration in May, we honored past presidents and announced the launch of the **Book of Life**, a digital gallery featuring stakeholders who have fulfilled a legacy gift.

# 2023-2024 FROM THE HEART



We value using our Donor Advised Fund at the Jewish Community Foundation knowing that through this vehicle we are supporting the Jewish Community. Each grant reinforces our family's tradition of *tikkun olam* and *tzedakah*. Each organization we support can see that a Jewish institution has facilitated that donation, demonstrating a commitment to community and to lifelong giving. It is also an efficient way to keep track of all donations given, year over year.

— *Jill Schwartz-Chevlin, JCFGM*

*Trustee, and Brian Chevlin,  
President, Jewish Federation of PMB*

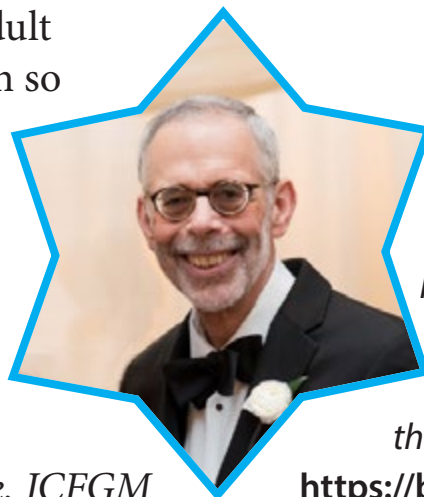


This has been a transformational year with the fulfillment of five Life & Legacy Promises, tripling The Jewish Center's Legacy Fund assets. How gratifying to know that congregants are committed to a strong future for TJC.

— *Heidi Joseph, President,  
The Jewish Center*

As a frequent participant in adult learning programs, I have been so impressed by the line-up of the JCFGM presenters who have shared insights on varying topics including antisemitism, Jewish history and culture, and strategies for charitable giving.

— *Don Leibowitz, Past Trustee, JCFGM*



*For a complete downloadable listing of thought-provoking and engaging discussions through April 2025, please go to*

<https://bit.ly/2024-2025Programs>

## DONOR ADVISED FUNDS

If you support charitable organizations, a Donor Advised Fund at JCFGM offers you added convenience and benefits such as:

- improved record keeping
- tax benefits
- growth of your philanthropic investment

To learn more, please contact Amy Zacks at 609-240-9511 or open your fund online at <https://bit.ly/OpenDAF>