



Dear John,

A NOTE FROM SHELLY BRODIE, INCOMING FOUNDATION CHAIR:

I'm deeply honored and excited to serve as the new Chair of The Foundation of the Greater Miami Jewish Federation.

Born and raised in Houston, Texas, I moved to Miami nearly 47 years ago when Steve and I got married. I always believed I grew up in the most remarkable Jewish community—until I found a new home here in Miami.

For more than 45 years, I've had the privilege of being involved in Jewish life across our community—through the Alper JCC in South Dade, Federation and synagogue life, AIPAC, CAJE, Hillel, and of course, The Foundation.

What connects all of these institutions is a shared commitment to ensuring the strength and continuity of Jewish life—here and across the globe. As the proud grandmother of five wonderful children, nothing matters more to me than securing their Jewish future, today and for generations to come.

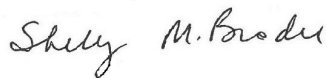
As Chair, my goal is to expand the Foundation's reach—through legacy giving and the growth of Donor-Advised Funds. Achieving this begins

with education: helping our peers understand the lasting impact of their legacy, both for their families and our community. We must also engage our professional advisors—attorneys, wealth managers, CPAs, and others—to champion the value of The Foundation with their trusted clients. Most importantly, we must show our entire community that the future of Jewish life truly lies in their hands.

Together, I know we can achieve great things.

Shalom,

Shelly



Shelly Brodie
The Foundation Chair



Scott Kaplan
The Foundation Director



PROTECT WHAT MATTERS AND UPLIFT A CAUSE YOU LOVE



Did you know that nearly 70% of adults do not have a will? This August, **Make-A-Will Month**, we invite you to take a simple but powerful step to protect the people and values you care about. Creating

a will isn't just for the wealthy; it's for everyone. A will ensures that your wishes are honored and your legacy lives on. It is also an opportunity to include a meaningful gift to the causes and

organizations that reflect your ideals, like The Greater Miami Jewish Federation.

By including a legacy gift in your will, you help strengthen the Jewish future and ensure that our community thrives for generations to come. Whether you're writing your first will or updating an existing one, now is the perfect time. [Click here](#) to learn how **easy** it can be to include Federation in your will.

Washington News

No Tax on Employer Student Loan Payments

On August 6, 2025, the Internal Revenue Service (IRS) reminded employers that student loan payments can be included as part of their educational assistance programs.

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Finances

Tyson Posts Quarterly Results

Treasury Yields Increase

Mortgage Rates Continue to Decline



Personal Planner

Do You Have a Difficult Family?

A businessman with a \$2.5 billion estate passed away in 1976. He was single and many individuals, mostly unrelated to him, filed more than 40 wills with the probate court.

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Savvy Living

Where to Find Senior Discounts in 2025

Are there any resources available to assist those aged 50 and above in locating senior

discounts?

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Gift in Your Will



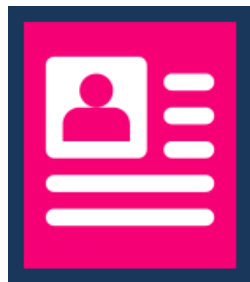
IRA Charitable Rollover



Gifts of Retirement Assets



Donor-Advised Funds



FREE ESTATE PLANNING GUIDE



**PLANNED GIVING
CALCULATORS**

DISCLAIMER: The Foundation of the Greater Miami Jewish Federation does not provide tax advice. Please consult with your professional advisor before taking any action. As with any significant tax and charitable planning, it is advisable to carefully

consider potential changes in the context of your complete financial profile.

For questions about making grants from your donor-advised fund, please contact Dyanna Loeb, Donor Services Associate, at dloeb@gmjf.org or call 786.323.7006.

You may also access your fund online through our donor portal at <https://gmjf.donorfirstx.com/>. To learn more about accessing your fund or creating a new fund or legacy gift, contact Scott Kaplan, Foundation Director, at skaplan@gmjf.org or 786.866.8623 or Miriam Masia, Senior Philanthropic Advisor, at mmasia@gmjf.org or 786.866.8627.

The Foundation of the Greater Miami Jewish Federation, 4200 Biscayne Blvd, Miami, FL 33137

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