



Dear John,

This past year has been challenging for the Jewish community, as we approach the first anniversary of October 7 and rising antisemitism. Yet, we as Jews, are reminded of the strength we find in our community and the hope for brighter days ahead.



As we approach the joyous celebration of *Rosh Hashanah*, we can still appreciate the beauty and significance of new beginnings. *Rosh Hashanah* is a time for reflection, renewal and hope. As we celebrate this promise of revival, we are delighted to introduce three new members to the Foundation team (Miriam Masia, Julie Phipps, and Dyanna Loeb) and congratulate Julian Ospina on a promotion.



Miriam Masia is ready to lead us into a prosperous new year as our new *Senior Philanthropic Advisor*. Miriam will function in a development capacity with oversight of our Forever Pacesetter and Forever Lion programs. Miriam served as Co-Director of our Golden Care program for the past 8 years and is excited to parlay her relationship-building skills to our development team.

Julie Phipps joins us as our *Investment Operations Manager* and embodies the forward-thinking mindset that Rosh Hashanah inspires.

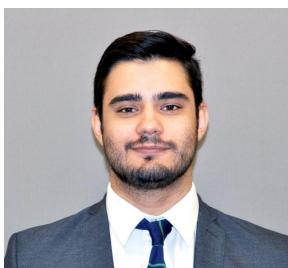


Julie will oversee our Foundation's investment portfolio, with total assets under management of nearly \$500 million, and staffing of the investment committee. Julie comes from Jefferies, a global investment bank, as an analyst.



Dyanna Loeb brings a fresh perspective to her role as *Donor Services Associate*, working with our donor-advised fund (DAF) holders and agencies servicing and processing all gifts/contributions and grants. Dyanna joins The Foundation team after serving in various roles as a Jewish communal professional over the past 15 years. Dyanna will now be the primary point of contact and liaison to

all DAF holders.



Congratulations to **Julian Ospina** who was promoted from *Foundation Grants Manager* to *Foundation Operations Manager*. Julian will work in partnership with Scott on oversight of fund administration and management of our life insurance policy program. Julian's energy and innovation align perfectly with the spirit of renewal.

Our team is here to be your trusted philanthropic partner and to explore the various options of how to create your own lasting legacy for our Jewish community today and for the future. Contact **Scott Kaplan** at skaplan@gmjf.org or 786.866.8623 or **Miriam Masia** at mmasia@gmjf.org or 786.866.8627 to learn more.

To read stories about other donors who have created their Jewish legacy, check out our online **BOOK OF LIFE**.

Wishing you a healthy, happy and sweet New Year!

Shana Tovah!

Sidney Pertnoy

Scott Kaplan

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immediate circle by creating a **donor-advised fund** (DAF) through The Foundation of the Greater Miami Jewish Federation. These funds allow you to support causes close to your heart, making a meaningful impact in the community and beyond.

The benefits of creating a DAF with The Foundation of the Greater Miami Jewish Federation include:

- Receive a tax deduction for the year you make any contributions to the fund
- Create an opportunity to give as a family as you may name multiple users to a donor-advised fund
- Contributions into your fund are invested and grow tax-free to make an even greater impact
- Simplify and centralize your tax receipts by receiving one tax receipt from The Foundation of the Greater Miami Jewish

Federation for contributions added to your fund and then make grant recommendations to different charities when you want

This high holiday season, let the joy of family inspire you to give back in a way that resonates with your shared values and aspirations. For more information on creating a donor-advised fund, [click here](#) or contact Scott Kaplan, Foundation Director at skaplan@gmjf.org or 786.866.8623.

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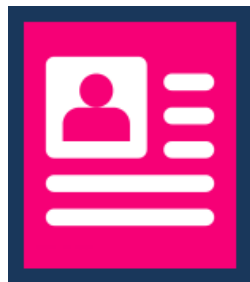
IRA Charitable Rollover



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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 786.866.8172.

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 call 786.866.8623 or Miriam Masia, Senior Philanthropic Advisor, at mmasia@gmjf.org or call 786.866.8627 to learn more.

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

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