

Dear John,

Welcome to the February edition of The Foundation of the Greater Miami Jewish Federation's e-newsletter. You are receiving this as a service to our friends and supporters with topics that impact your quality of life, your finances, philanthropy and your legacy. We are pleased to share with you the latest news, donor stories and timely articles.

This week, we celebrated Tu B'Shevat, the "birthday of the trees." It reminds us of the story from the Talmud of Honi, who saw a man planting a carob tree. He asked him, "How long does it take [for this tree] to bear fruit?" The man replied, "Seventy years." He then asked, "Are you certain that you will live another seventy years?" The man replied, "I found carob trees in the world; as my fathers planted these for me so I too plant these for my children."



From this simple yet profound story, we thank all of those who have already planted a seed for future generation by creating a legacy gift. If you have not yet done so, we hope you will be consider creating your own Jewish legacy. Please read our featured donor story below about Carolynn & Michael Friedman to see how they have included the Jewish community in their plans. You may be looking for a way to make a significant gift to help further our mission. A gift in your will or trust is one of the most popular and flexible ways that you can support our Miami Jewish community.

There are many benefits to making a gift in your will, including:

1. Does not affect your current income or assets during your lifetime
2. Easy to create and modify with the assistance of an attorney if your circumstances change
3. Effective planning tool to reduce estate taxes, if applicable
4. You create a lasting legacy to be remembered

Please let us know how we can help support your charitable giving and create your lasting Jewish legacy. Contact Scott at skaplan@gmjf.org or call 786-866-8623.

Sincerely,



Sidney Pertnoy
Foundation Chair




Scott Kaplan
Foundation Director



Donor Story - Carolynn & Michael Friedman

CAROLYNN AND MICHAEL FRIEDMAN

For the past 20+ years, the Friedmans have been steadfast contributors to the Greater Miami Jewish Federation. Through a gift in their will, Carolynn and Michael fully endowed their Annual Campaign gift, making them both *Forever Pacesetters* and Carolynn a *Forever Lion*.



They commented, "as 'forever donors' to Federation, we hope to make the world a better place for our children and grandchildren. We are blessed that we are in the position to perpetuate our family legacy of *Tikkun Olam*. Federation provides hope and a safety net for all Jews who are in need – in Miami, in Israel and in Jewish communities around the world." They have come to realize that not many organizations have a wider reach.

Here is the link to their full story in our [Book of Life \(Friedman\)](#).

To learn how you can support the Miami Jewish community through a gift in your will, click [HERE](#).

To read more donor stories, check out our [Book of Life](#).

Personal Planner

Trusts for Creative Spenders

Trusts can be quite useful for protecting children. However, for some children, the trust serves an additional function: it protects the principal from being rapidly spent by a child.

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Savvy Living

What to Do When a Loved One Passes

What steps need to be taken after a loved one passes away? A family member of mine who has no children was diagnosed with terminal cancer. He has asked me to take care of his affairs so I would like to know how to prepare.

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Washington News

IRS 2022 Tax Return Checklist

In IR-2023-17, the Internal Revenue Service (IRS) suggested a checklist for 2022 tax returns. The IRS offered several recommendations that will assist taxpayers and make for a smooth tax preparation year.

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Finances

General Motors Releases Earnings

Treasury Yields Rise

Mortgage Rates Edge Lower



Gift in Your Will



IRA Charitable Rollover



Gifts of Retirement Assets



Donor-Advised Funds



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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.*

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