



Generations

THE PLANNED GIVING NEWSLETTER OF THE UNITED STATES HOLOCAUST MEMORIAL MUSEUM

A Sister's Wishes Honored



Family members attend the unveiling of the Rosalie Avery inscription on the Museum's Donors Wall. *From left:* Director of Planned Giving George E. Hellman, Dave Bayewitz, Dr. Hinda Avery, Marvin Avery, Reta Avery, Passi Bayewitz and Museum Chief of Staff William Parsons.



LEGACY of LIGHT
SOCIETY

The Legacy of Light Society recognizes those who have made a planned gift to the Museum. To learn how you can join, visit www.ushmm.org/plannedgiving.

Rosalie Avery's entire Jewish identity centered on Holocaust history and its timeless lessons. In fact, she was described at her funeral as being an "intolerant person" because she was "intolerant of intolerance."

Rosalie devoted enormous energy to studying the Holocaust and learning the fate of her mother's family. This included a pilgrimage to Poland and Auschwitz. Rosalie's grandfather was murdered the day the Nazis arrived in their shtetl of Staszow, Poland, south of Kielce, on September 7, 1939. Rosalie's grandmother was believed to have been deported to a concentration camp where she eventually perished. Her aunt and her twin children also were killed, although it is unknown exactly where. One uncle survived three camps. Three other uncles emigrated to

Toronto, Ontario, in the 1920s and her mother, a staunch Zionist, was sent there in 1933 to prevent her from running away to Palestine.

Born in Vancouver, British Columbia, in 1943, Rosalie lived most of her life in Los Angeles, California, where she worked as the Senior Administrative Analyst for the Office of the City Administrative Officer for Los Angeles. As a devoted public servant, she received numerous awards from the city, and when she passed away suddenly in 2005, the City Council adjourned a meeting in her honor. She had an enormous presence, which affected everyone around her.

Rosalie's commitment to Holocaust awareness and education led her to designate the United States Holocaust Memorial Museum as a major beneficiary of her estate. However, this gift would never have reached the Museum were it not for Rosalie's siblings: her brother, Marvin Avery, and his wife, Reta, and her sister, Dr. Hinda Avery.

When Rosalie executed her Will in California, she did not have it witnessed by two individuals, rendering the Will invalid. Under

Continued on page 3

From the Director of Planned Giving



Documenting and preserving Holocaust history is one of the Museum's highest priorities and most sacred obligations. Our archives already house millions of pieces

of evidence of that crime, including 40 million pages of records. And as you can see from the article on page 3, we also are currently seeking information and artifacts relating to the voyage of the refugee ship *Exodus 1947*.

In addition, after years of pressure from the Museum, the 11-nation commission of the International Tracing Service (ITS) in Bad Arolsen, Germany, finally agreed to open its archives. Survivors and their families will soon be able to obtain information about the fate of their loved ones, and scholars will have access to these previously closed records from concentration, slave labor, and displaced persons camps.

Establishing a planned gift for the Museum will help ensure our ability to always be able to collect, preserve, and provide access to these and the other critical Holocaust-era documents and artifacts. What better way than this to help **honor the last generation and enlighten the next**.

If you are interested in learning more about planned giving opportunities with the Museum, please contact me at 202.488.6591. Thank you.

George E. Hellman

George E. Hellman

Earn More with a Deferred Payment Gift Annuity

Charitable gift annuities are a wonderful way to fulfill your charitable objectives because they can be tailored to meet your individual financial needs and timetable.

With a standard charitable gift annuity, your payments can start right away. Instead of receiving payments immediately, however, like many others you may prefer to defer the payments for a few years—until a later date, such as when you retire. Deferring payments can be ideal if you are currently earning income and do not necessarily need additional income now, but you might want more income in your retirement years. If this sounds appealing to you, now is a great time to take advantage of these higher rates and, at the same time, help the Museum fulfill our mission.

Sample One Life Deferred Gift Annuity Schedule

| Begin Age/ Payment Age | Annuity Rate |
|---------------------------|-----------------|
| 50/60 | 9.4% |
| 50/65 | 12.8% |
| 50/70 | 17.9% |

How It Works

You make the contribution now, securing a current income tax charitable deduction, and the Museum agrees to pay you fixed payments for life starting at any date you select. This is especially advantageous if your tax bracket is higher now than you anticipate it will be later. In addition, the payment rate for a deferred gift annuity can be considerably higher than if you had your payments begin immediately.

Example: *Susan is age 50. She gives \$40,000 to establish a deferred payment gift annuity, arranging for payments to start when she reaches age 65. She itemizes her income tax deductions, so she will be able to deduct \$20,919.* Based on current rates, Susan will receive \$5,120 each year (\$957 of which is income tax-free) beginning at age 65, a rate of 12.8 percent.*

Count the Advantages

The most important advantage you gain from a deferred gift annuity is the opportunity to make a major contribution to the Museum while still meeting your personal financial needs.

Count the other benefits:

- You can supplement future retirement funds with a known dollar amount.
- Your contributions are unlimited, unlike those for qualified pension plans.
- You can secure a substantial income tax charitable deduction immediately.
- You can receive secure payments that are partly income tax-free.
- You free yourself of investment worries on amounts you contribute.

We will be glad to explain the specific financial benefits you can enjoy. For more information, please contact George E. Hellman, J.D., Director of Planned Giving, at 202.488.6591 or ghellman@ushmm.org.

* This example is based on quarterly payments and a 5.8 percent charitable midterm federal rate.

A Coat of Many Colors: Jewish Life and Culture in Europe before the Holocaust

The Third Annual Legacy of Light Society Luncheon
February 27, 2007 • Boca Raton, Florida



Photo right: (from left) Luncheon Committee member Barbara Byer and Museum Council member Arlene Herson. Barbara and Arlene are also members of the Legacy of Light Society.



PHOTOS BY JEFFREY THOLL

Above: (from left) Museum Chairman Emeritus, Miles Lerman; Avinoam Patt, Ph.D., the Miles Lerman Applied Research Scholar for Jewish Life and Culture; and Chris Lerman. The Lermans are Museum Pillars of Memory.



The 2007 Luncheon Committee and program participants (from left): Stacey Reines, George E. Hellman, Genia Sommer, Avinoam Patt, Ph.D., Delores Botnick, Phyllis Blum, Celeste Maier, Barbara Byer, Maryla Korn, and Sara Klompus.

Seeking Passengers of the *Exodus* Voyage

With the upcoming 60th anniversary of the infamous voyage of the *Exodus 1947*, the Museum's Registry of Holocaust survivors, in conjunction with the Central Zionist Archives in Jerusalem, is searching for information on passengers of the refugee ship. The head of the Exodus Survivors Convention Committee has located 1,800 of the approximately 4,500 original passengers. Now, the Museum is working to locate other passengers currently or formerly living in Europe, Israel, South America, the United States, and Canada. This effort aims to create the first complete manifest of this voyage.

The Museum is searching for information, testimony, artifacts, film, and photographs from the voyage. Passenger names will be added to the Museum's Benjamin and Vladka Meed Registry of Holocaust Survivors.

Please contact Museum Curator Genya Markon at 202.488.6108 or gmarkon@ushmm.org with any information.

A view of the damaged *Exodus 1947* as it is towed into the port of Haifa after its interception by the British navy, July 1947. USHMM, courtesy of Saliba Sarsar.



A Sister's Wishes Honored

Continued from page 1

California law, the entire estate was distributed to Rosalie's two surviving siblings. Yet, Rosalie's family decided to honor their sister's wishes by donating an amount to the Museum that was equivalent to the bequest: the extraordinary sum of \$450,000. The family still felt Rosalie's presence—as Marvin said, “they knew Rosalie would be watching.” Rosalie's family traveled to the Museum in November 2006, where they participated in the unveiling of a permanent engraving on the Donors Wall in recognition of her generosity



Rosalie Avery

If you would like information on how you can leave a legacy gift, please contact George E. Hellman, J.D., Director of Planned Giving, at 202.488.6591 or ghellman@ushmm.org, or visit our Web site at ushmm.org/plannedgiving.

Please help the Museum forever preserve the memory of survivors and other victims of the Holocaust.

I would like to receive the following free brochures:

- The Charitable Gift Annuity: A Simple Gift That Benefits You, Too*
- Deferred Charitable Gift Annuity: Waiting Can Pay Off*
- Your Will: Planning for Your Life, Your Family, Your Legacy*

- I would like a personal illustration of how a charitable gift annuity would provide me payments for life. *Please indicate the amount(s) you would like illustrated:*

\$100,000 \$50,000 \$25,000 \$10,000 Other \$ _____

The illustration should be prepared for:

Name _____ Birth date _____

Name of second individual (*optional*) _____

Birth date _____

Start date of payments (*if deferred*) _____

- I would like to receive more information about the Museum's Endowment Fund.
- I am interested in making a gift to the Museum's Annual Fund and would like a Museum representative to contact me.

Name (*please print*) _____

Address _____

City _____ State _____ Zip _____

Telephone _____

E-mail _____

This information will be kept strictly confidential.



LEGACY of LIGHT
SOCIETY

UNITED STATES
HOLOCAUST MEMORIAL MUSEUM
100 Raoul Wallenberg Place, SW
Washington, DC 20024-2126
202.488.6591
www.ushmm.org/plannedgiving



PLACE
STAMP
HERE

LEGACY *of* LIGHT
SOCIETY

George E. Hellman, J.D.
Director of Planned Giving
United States Holocaust Memorial Museum
100 Raoul Wallenberg Place, SW
Washington, DC 20024-2126



FOLD AND TAPE CLOSED. PLEASE DO NOT STAPLE.



*Honor the last generation.
Enlighten the next.
Leave a legacy bequest to the Museum.*

Museum Exhibitions Around the Country

For a complete listing of events, please visit ushmm.org.

Deadly Medicine: Creating the Master Race

ATLANTA, GEORGIA

Centers for Disease Control and
Prevention (CDC), Global Health
Odyssey, Tom Harkin Global
Communications Center
Now through August 10, 2007

BEACHWOOD, OHIO

The Maltz Museum of
Jewish Heritage
September 25, 2007-January 6, 2008

Fighting the Fires of Hate: America and the Nazi Book Burnings

BALTIMORE, MARYLAND

Enoch Pratt Free Library
July 25-October 2, 2007

SCOTTSDALE, ARIZONA

Scottsdale Public Library
December 20, 2007-February 12, 2008

Cover masthead photo composite: The Ratzer family, Poland, 1934. USHMM, gift of Shirley Koperberg Willig; Young visitors view the Museum's Yaffa Eliach Shtetl Collection. PHOTO BY THOMASARLEDGE.COM.

Schindler

CINCINNATI, OHIO

National Underground Railroad
Freedom Center
Now through August 15, 2007

MONMOUTH, ILLINOIS

Buchanan Center for the Arts
August 25-October 25, 2007

Nazi Persecution of Homosexuals: 1933-1945

MAITLAND, FLORIDA

Holocaust Memorial Resource
and Education Center
Now through August 25, 2007

PITTSBURGH, PENNSYLVANIA

American Jewish Museum of
the Jewish Community Center
of Greater Pittsburgh
November 18, 2007-January 12, 2008



REUTERS/Larry Downing

Lodz Ghetto Exhibition Through October 8

As teenagers, Henryk Zvi Bergman and Jutta Szmigeld (*above*) survived the Lodz ghetto and Auschwitz. Following the war, they were reunited and married after each returned to Lodz in search of family. The Bergmans appear in front of the Museum's newest special exhibition, "*Give Me Your Children*": *Voices from the Lodz Ghetto*. Curators Jacek Nowakowski and Teresa Pollin used diaries—including Jutta's—memoirs, photos, films, official documents, and objects to tell the story of the children of the Lodz ghetto. The exhibition is on view in Washington, D.C. through October 8. An online presentation of *Voices* may be viewed at ushmm.org. Read more about the couple's story in the Museum's Holocaust Encyclopedia, which may be accessed through the online exhibition.

UNITED STATES HOLOCAUST MEMORIAL MUSEUM

100 Raoul Wallenberg Place, SW, Washington, DC 20024-2126