

The Planned Giving Newsletter of the United States Holocaust Memorial Museum

Generations



Legacy of Light Guardian Kaja Finkler entrusts the Museum with preserving and transmitting Holocaust history.

Photo: Max Cohen

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Endowing the Future of Holocaust Education

As a lifelong educator, Dr. Kaja Finkler believes strongly in the United States Holocaust Memorial Museum's mission of Holocaust education and remembrance. "I want the Holocaust to be taught to people who have not been exposed to it and have no connection to its history," she says. "Young people today must know about this because it's part of the legacy that they inherited and that also has shaped their lives. They must make sure it never happens again."

A Holocaust survivor, she recently wrote about her wartime experiences in a book titled *Lives Lived and Lost: East European History Before, During and After World War II as Experienced by an Anthropologist and Her Mother*. The book is based on Kaja's memories and those of her late mother, who recorded them on a set of 100 tapes before she passed away in 1991.

The only child of a distinguished Polish rabbinical Hasidic family, Kaja was born in

Warsaw in the mid-1930s. In 1940, she and her mother were forced into the Warsaw ghetto, where they lived together until Kaja was smuggled out in 1941 to avoid a typhus epidemic. She was sent to the ghetto in Piotrków, where she was reunited with her father. He was trapped in Piotrków when the Germans invaded Poland and had been unable to return home to Warsaw. After sustaining multiple beatings in the Piotrków ghetto, Kaja's father died there in her arms. Kaja survived the Piotrków ghetto liquidation, working in a slave labor plywood factory, and was eventually sent to the Ravensbrück concentration camp and then to Bergen-Belsen, where British troops liberated her in April 1945. She was reunited with her mother in Sweden following a four-year separation. They immigrated to the United States in 1946.

After her retirement in 2009 from a 37-year career as an anthropology professor, Kaja began translating from Yiddish her mother's

experiences—memories that served, in her mother's words, as "a living diary, in honor of those who were murdered. My memories will be their tombstones for there are no tombstones or traces of them now." This work, which yielded her recent book, also led her to the Museum's library. The Museum's commitment to Holocaust education, its central location in the nation's capital, and its support from the federal government were all important motivators for her decision to designate the Museum as a beneficiary of her retirement plan assets and to become a Legacy of Light Society Guardian Founder.

"When I'm gone, I want people from all walks of life to still be learning about and discussing the Holocaust. This is very important to me," Kaja says. "Each person's experience during the Holocaust is unique and must be preserved and transmitted, and I am entrusting the Museum to ensure this happens."

From the Director of Planned Giving

The remainder of 2012 promises to be important for several reasons. In addition to elections this fall, a number of key tax law changes are scheduled to take place on January 1, 2013. As a result, this can be an especially critical time to review one's financial affairs.

While the recession of 2007-09 has officially ended, much uncertainty remains on the economic front. Stock market values have recovered, but historically low interest rates continue to restrict income for many.

In this issue of *Generations*, we revisit charitable gift annuities, a popular way to make a charitable gift that features attractive fixed payments for life and potential tax benefits. See page 3 for more information.

There are likely to be changes to federal estate and gift tax laws this fall or at the beginning of next year. Unless Congress acts before the end of the year, significant increases in these taxes are scheduled to take place automatically on January 1, 2013.

Those with an IRA or another tax-qualified retirement plan may wish to take steps now to assure that any funds remaining at the end of life not be subjected to both income and estate taxes.

Using all or a portion of these assets to leave a charitable legacy while directing less heavily taxed assets to heirs can be a wise strategy.

We will be pleased to offer additional information about any of the concepts presented here upon request with no obligation.

George E. Hellman
George E. Hellman, JD
202.488.6591 • ghellman@ushmm.org



George E. Hellman

20th Anniversary Legacy Challenge Announced

The Museum is pleased to announce that in honor of our 20th anniversary in 2013, two generous supporters have stepped forward to challenge each of us to make safeguarding truth for future generations our personal legacy. Through the establishment of their own planned gift of up to \$1 million, the anonymous challenge donors will **match up to 10% of each new planned gift to the Museum's endowment**, with a maximum of \$25,000 per gift. The 20th Anniversary Legacy Challenge is in effect until April 30, 2013.

"We are extremely grateful to these donors for their commitment to securing the Museum's future through their 20th Anniversary Legacy Challenge," says Diane Wohl, National Chair of the Museum's Legacy of Light Society. "Their generosity and dedication today will help to ensure the permanence of Holocaust memory and understanding tomorrow."

There are a variety of ways to participate in the Legacy Challenge:

- Name the Museum's endowment in your will.
- Designate the Museum's endowment as a beneficiary of your retirement plan assets.
- Donate a life insurance policy you no longer need.
- Establish a Charitable Gift Annuity that provides you and/or a loved one with income for life.

Thanks to the Legacy Challenge, a planned gift to secure the Museum's future—a gift that costs nothing today or provides income for life—has never had greater value. To learn more, please contact George Hellman, JD, at 202.488.6591 or ghellman@ushmm.org.



The Planned Giving Team

The Museum's Planned Giving team is a group of professionals who are dedicated to helping secure the Museum's future. For more information on how we can help you achieve your philanthropic goals, please contact your regional officer listed below.

George E. Hellman, JD
Director of Planned Giving
ghellman@ushmm.org • 202.488.6591
Midwest and Northeast Regions

Naomi Katz, JD
Associate Director of Planned Giving
nkatz@ushmm.org • 202.488.2681
Mid-Atlantic, Midwest, Northeast Regions

Sara Eigenberg, JD
Assistant Director of Planned Giving
seigenberg@ushmm.org
202.479.9733
Southwest, West and New England Regions

Mark W. Glickman, CFRE
Associate Director, Planned Giving and Major Gifts, Southeast Region
mglickman@ushmm.org
561.995.6773

Celeste Z. Maier
Director of Stewardship, Legacy of Light Society
cmaier@ushmm.org • 202.488.2634

Johanna Neumann
Planned Giving Associate
jneumann@ushmm.org • 202.488.6106

Yvette Jones
Planned Giving Program Assistant
yjones@ushmm.org • 202.314.1748

In Memoriam

The United States Holocaust Memorial Museum mourns the passing of the following Legacy of Light Society members:

Yona Dickmann	Peter Kovanic	Shirley Rothfeld
Rosina Karako-Smeraldi	Ruth Numkin	Blanche Zwern



PLEASE JOIN ME for this special day of behind-the-scenes programming at the Museum sponsored by the Legacy of Light Society. I promise it will be a day to remember!
 —Diane Wohl, National Chair of the Legacy of Light Society

SAVE THE DATE **Monday, October 29, 2012**

A Day at the Museum

what you do matters

- Behind the scenes look at the Museum’s innovative approaches to teaching the Holocaust in multi-faith settings;
- Lectures and roundtable discussions with educators, curators, conservators, and scholars-in-residence; and
- The opportunity to conduct family research at the Museum’s Holocaust Survivors and Victims Resource Center.

Cost is \$50 per person, lunch included. For more information, please contact Naomi Katz at 202.488.2681 or nkatz@usbmm.org, or Celeste Z. Maier at 202.488.2634 or cmaier@usbmm.org.



2011 Day at the Museum participants tour *State of Deception: The Power of Nazi Propaganda* with Museum historian Dr. Ann Millin. Through digital and mobile technology, including an interactive cell phone tour, the Museum seeks to make the exhibition accessible to millions worldwide.

Give and Enjoy Increased Income

The Museum’s gift annuity program offers an opportunity for you to make a meaningful gift today and arrange for a dependable source of income that will continue for as long as you live.

Gift annuities provide increased income as well as the possibility of immediate and future tax benefits.

Because a portion of your gift annuity will ultimately be used to support the Museum’s endowment, you are entitled to deduct a portion of the amount used to fund your gift annuity in the tax year that you establish it. And of course you have the satisfaction of knowing your gift will help secure the Museum’s future.

As an added benefit, if you fund a gift annuity with securities that yield little income but have increased in value since you have owned them, you can unlock additional income while you partially avoid and/or delay payment of the capital gains tax that would otherwise be due on a sale.

In addition, part of each payment you receive will be completely free of income tax for a period of time equal to your life expectancy—and there generally will be no estate tax due on your gift annuity.

Many Museum donors have been so pleased with their first Museum gift annuity that they have established additional ones. This can be a practical way to make gifts while increasing your income in retirement years.

Join many Museum supporters who have chosen to make meaningful gifts in a very special way. To learn more about how you can enjoy the benefits of a Museum gift annuity, please return the attached card or contact Naomi Katz, JD, Associate Director of Planned Giving, at 202.488.2681 or nkatz@ushmm.org.

Gift Annuity Payment Rates

Selected Rates for One Person		Selected Rates for Two Persons of the Same Age	
Age	Rate	Ages	Rate
90+	9.0%	90/90	8.2%
85	7.8%	85/85	6.7%
80	6.8%	80/80	5.7%
75	5.8%	75/75	5.0%
70	5.1%	70/70	4.6%

For illustrative purposes only. Please write for current benefits and rates for other ages. Rates current as of June 2012.

The purpose of this publication is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states. ©MMXII RFSO, Inc. All Rights Reserved. All photos courtesy of US Holocaust Memorial Museum except as otherwise noted.

Danish Rescue Efforts: A New Resource

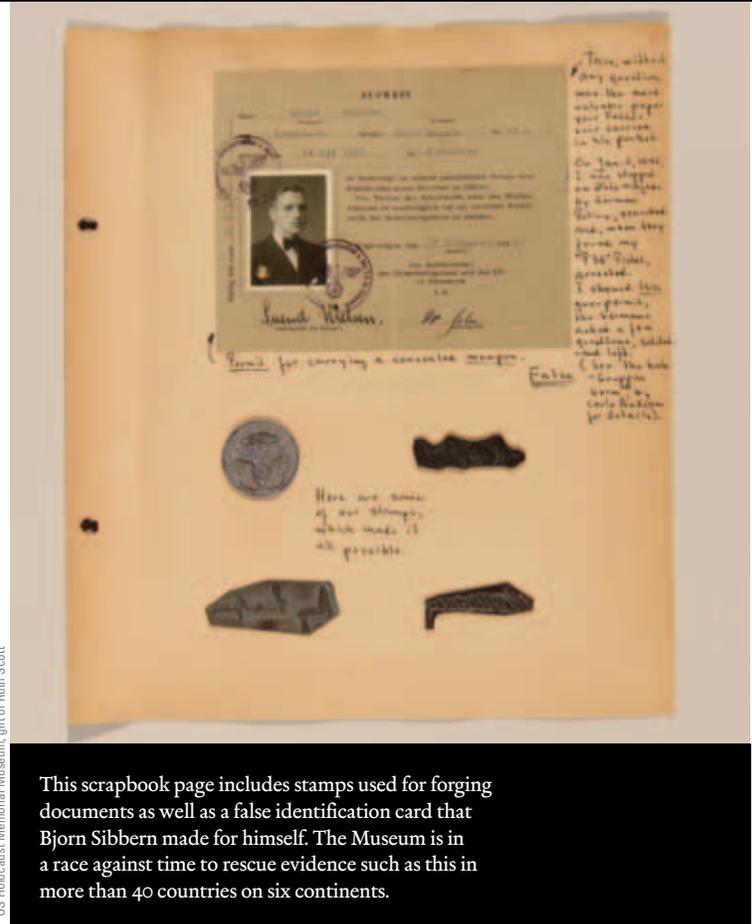
In describing their meticulously compiled five-volume scrapbook documenting life in wartime Denmark, Bjorn and Tove Sibbern wrote, “It will show brief glimpses from the war years in Denmark, as seen with the eyes of average people.” More than 200 pages, this new accession to the Museum’s collection offers much more.

Beginning with the German invasion on April 9, 1940, and comprising over 1,000 individual pieces of paper evidence, the scrapbook offers a near-daily account of Danish life under Nazi occupation.

The scrapbook includes anti-Jewish signs that Bjorn Sibbern explains he and others quickly ripped down, as well as both false identification cards he used to move around Copenhagen and elsewhere freely, and different kinds of buttons worn by members of the resistance—each becoming more subtle to avoid detection. The scrapbook in this way provides a range of artifacts representing specific actions taken by the Danes to erode German authority.

The Museum has long owned one of the boats used to clandestinely ferry Danish Jews to safety in Sweden; the Sibberns’ scrapbook adds another layer of detail to our understanding of the complex issue of Danish resistance. Judy Cohen, director of the Museum’s Photographic Reference Collection, was responsible for the acquisition of the scrapbook. She notes, “Until now, the Museum has had a paucity of artifacts documenting the German occupation of Denmark. The new scrapbook fills this previous gap in our collection. It documents early Danish collaboration with the Nazis, the growth of the underground and sabotage efforts, and the unique role played by the police to facilitate both rescue and resistance.”

In September and October 1943, Denmark saved the vast majority of its Jews from deportation to concentration camps. The Sibberns went to great lengths to document this difficult time and later



US Holocaust Memorial Museum, gift of Ruth Scott

This scrapbook page includes stamps used for forging documents as well as a false identification card that Bjorn Sibbern made for himself. The Museum is in a race against time to rescue evidence such as this in more than 40 countries on six continents.

entrusted the completed set to Ruth and Dell Scott of California, who felt that the Museum was the best place to preserve the scrapbook.

Filling critical gaps in the Museum’s collections will enable us to examine this history from every perspective and continue to teach it with power and authenticity. Evidence such as this scrapbook will be the sole witness to the Holocaust when the survivors are no longer at our side. Intensifying our efforts now to rescue these extraordinary documents will ensure we can safeguard truth for future generations. That is what we owe to those we memorialize.

Leave a Bequest for Future Generations

The most powerful way you can help secure the Museum’s ability to meet global challenges in an uncertain future is through an unrestricted gift to the Museum’s endowment. If you are considering including the Museum in your will or living trust, you may want to provide your attorney with the language to the right.

Should you or your attorney have any questions, please contact a member of our Planned Giving team (see page 2). We are always happy to assist in any way we can.

“I [Name] hereby give, devise and bequeath [the sum of \$ (dollar amount)] [(percentage) % of my residuary estate] to the United States Holocaust Memorial Museum (Federal Employer Identification Number 52-1309391), an independent establishment of the United States government, located at 100 Raoul Wallenberg Place, SW, Washington, DC 20024-2126, to be used by it in support of its Permanent Endowment Fund, an unrestricted permanent real endowment fund, or its successor fund, if any.”

Survivor Honored by Albanian Prime Minister

Although she was only eight years old at the time, Museum volunteer and staff member Johanna Neumann vividly remembers the events of *Kristallnacht* in November 1938. She and her family escaped soon after from Germany to Albania, where they remained throughout the war, moving from one town to another a total of 17 times. During the German occupation of 1943-44, they were hidden by an Albanian Muslim family. In 1945, Johanna and her family stayed at a displaced persons camp in Italy before they were able to immigrate to the United States.

Johanna was recently honored by the Albanian government for her efforts to have her rescuers recognized as Righteous Among the Nations by Yad Vashem. In a moving ceremony at the Museum on April 26, 2012, Prime Minister of Albania, Dr. Sali Berisha, congratulated Johanna for becoming “one of the best ambassadors of the moral code of my country.”

A Museum volunteer since 1990, Johanna also works in the Museum’s Office of Development, where she encourages individuals to make legacy gifts.



Prime Minister of Albania Dr. Sali Berisha presents Johanna Neumann with a certificate recognizing her efforts to have her rescuers honored as Righteous Among the Nations.

WHAT KIND OF WORLD WILL FUTURE GENERATIONS INHERIT?



The Holocaust compels us to ask that question... and above all, **TO ACT ON IT.** We are proud to recognize as Legacy of Light Guardians supporters who have made **SAFEGUARDING TRUTH** their personal legacy through a deferred or outright gift to the Museum’s endowment. To learn more, please call George E. Hellman, JD, at 202.488.6591 or visit ushmm.org/endowment.

Legacy of Light **GUARDIANS**

Portrait of two brothers in the Kovno ghetto taken shortly before their round-up in the March 1944 “Children’s Action.”

Photo: US Holocaust Memorial Museum Courtesy of Shraga Wainer. Photo by George Kadish.

Museum Exhibitions around the Country

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

Beckley, West Virginia

Raleigh County Public Library
Through June 10, 2012

North Little Rock, Arkansas

William F. Laman Public Library
August 31-October 28, 2012

Nazi Persecution of Homosexuals 1933-1945

Rochester, New York

Jewish Community Center of Greater Rochester
May 23-July 22, 2012

Palm Beach County-Lake Worth, Florida

Compass Community Center
November 27, 2012-January 27, 2013

For a complete listing of all traveling exhibitions, visit ushmm.org.

Upcoming Events to Celebrate the Museum's 20th Anniversary

To mark its 20th anniversary, the Museum will host a series of programs nationwide to honor the victims and survivors, recognize the Museum's first two decades of success, and inspire new generations to carry the "torch of remembrance" into the future.

We hope you can join us. For more information, please contact Celeste Z. Maier at 202.488.2634 or cmaier@ushmm.org.

Los Angeles, California
November 8, 2012

Boca Raton, Florida
December 9, 2012

New York, New York
March 3, 2013

Washington, DC
April 28-29, 2013

Chicago, Illinois
June 9, 2013

Legacy of Light Society members in South Florida display the certificates of appreciation they received at a Donor Appreciation tea held on April 1, 2012, in the home of Arlene Herson, the Museum's South Florida Regional Legacy of Light Chair. From left to right standing: Rosalyn August, Sue Shapiro, Arlene Perlman, Arlene Herson, Rabbi Marc Liebhaber, Eve Barak. From left to right seated: Marilyn and Kurt L. Wallach, Nancy and Barry Dershaw, Barbara Byer.



Photo: Jeffrey Tholl.

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MUSEUM



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SAFEGUARDING TRUTH FOR FUTURE GENERATIONS

The **Legacy of Light Society** recognizes individuals who have made a commitment to secure the Museum's future and its timeless cause by including the Museum in their estate plans. In addition, individuals who direct any type of gift to the Museum's endowment are recognized as **Legacy of Light Guardians**. Make a bequest or other gift today to the Museum's endowment, and let your commitment live forever.

YES, I'm ready to safeguard truth for future generations. I would like to receive more information about the Museum's endowment and how I can secure the future impact of the United States Holocaust Memorial Museum with a gift that can also help enhance my financial security today.

I would also like to receive complimentary materials about:

- Giving Through Your Will
- Giving Through Charitable Lead Trusts
- Giving Through Life Insurance
- Legacy Giving Through My Family Foundation
- Giving Through Gift Annuities

Please send me payment and tax benefit information based on the following amount \$ _____ and the birthdate(s) ____/____/____ and ____/____/____ (second individual optional).

- I have already included the Museum in my will or other estate plans.
- Please enroll me as a member of the **Legacy of Light Society** and send me information about the benefits of being a **Legacy of Light Guardian**.
- I would consider including the Museum in my estate plans.
- I would like to learn more about the 20th Anniversary Legacy Challenge and how my planned gift can be matched.
- I am interested in making a contribution to the Museum's Annual Fund. Please contact me.

Name (please print)

E-mail (optional)

Telephone (optional)

Address

City, State

Zip

This information will be kept strictly confidential.

The Museum's Federal Employer Identification Number is 52-1309391

United States Holocaust Memorial Museum
Planned Giving
100 Raoul Wallenberg Place, SW
Washington, DC 20024-2126
202.488.6591

**Legacy of
Light
Society**

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Who will be at their side tomorrow?
**THROUGH YOUR LEGACY GIFT
TO THE MUSEUM, YOU WILL.**

Photo: Thomas Arledge

EVERY WILL MATTERS. HAVE YOU PUT THE MUSEUM IN YOURS?