

The Planned Giving Newsletter of the United States Holocaust Memorial Museum

Generations

Two Families Intertwined Through History

What's in a legacy? For my wife's family and mine—the Molhos and Yedids—it crosses generations and continents before finding commonality in the vibrant Greek city of Salonica. Pre-World War I, this diverse city had a significant Jewish population. Following World War I, our families' paths diverged when the Ottoman Empire fell.

My mother's family immigrated to Alexandria, Egypt, by the early 1930s. I grew up with stories of Salonica from my maternal grandparents and learned to speak Ladino, the city's Spanish dialect spoken by the Jewish community. That was my only connection to the city as my mother's extended family was killed in the Holocaust. The Suez Crisis forced us to leave Egypt by boat and we became refugees in Italy before immigrating to Brooklyn in 1958, when I was 15.

Marcella's family stayed in Salonica. Lily and Saul Molho were new parents to her older brother, Tony, when Salonica was invaded by the Nazis in 1941. At first, nothing happened. A German army officer occupied a spare room of theirs and babysat—until everything changed in 1943. Tides shifted when the community was divided into ghettos and Saul, a Greek businessman, was forced to vacate the shop he owned.

Marcella's parents avoided registering as Jews under the Nazi regime and escaped the city using fake names. The small family was forced to separate until they were reunited in postwar Salonica. News arrived that most of their extended family had been killed in the Holocaust along with nearly 96% of the city's Jews, about 50,000 people.

In 1946, Marcella was born and named after her mother's beloved sister who was killed at Auschwitz-Birkenau. The family worked hard to rebuild their lives after the war. Haunted by the ghosts of those they lost, they moved to Cleveland, Ohio, in 1956 for a fresh start.

Twelve years later, I met Marcella when we were graduate students at Brown University in Rhode Island. We discovered that we both had ties to Salonica. I proposed to her after three weeks of dating, and we were married for 48 years. It was the best thing that has ever happened to me.

Marcella, who passed away in 2016, and I have always felt strongly about the Museum's critical role in teaching the timeless lessons of the Holocaust. When we took a trip to the Museum we were deeply moved. Together we decided to establish a legacy gift for the Museum, providing permanent resources to assist in the sacred work of remembering and honoring those who were lost, and educating future generations.



Roger Yedid and his late wife Marcella Molho Yedid, Legacy of Light Guardians, Cleveland, Ohio.

“The Museum exists to keep the world's conscience. That's why we decided to establish a legacy gift.”

— Roger Yedid

A Note from the Legacy of Light Chair

Dear Friends of the Museum,

It's hard to believe I recently passed my one-year anniversary as your Legacy of Light Chair. I have learned so much about this important Museum, its programs, and its critical role in the world. I've heard the inspiring stories of many donors—similar to my own mother's—who followed their hearts and gave their time, talents, and financial support to create this living memorial to teach the lessons of the Holocaust.

During this year, I have contacted new and old Society members with my personal thanks, and also had the privilege of meeting many of you to discuss how we can continue to build on our past work. Most recently I attended the Museum's annual Philadelphia Dinner, and will attend the South Florida Dinner in Boca Raton in late January. As I get to know fellow supporters, it is clear that our Society members are not only committed to ensuring the Museum's future, but also engaged in a deep relationship with this extraordinary institution.

We bring different stories to the Museum family, but collectively we are working to confront hatred and promote human dignity through gifts in our estate plans. It is a timeless cause—one full of challenges and opportunities. With your generosity, we are making a lasting impact future generations will inherit. Our children, grandchildren, and great-grandchildren deserve nothing less.

Enduring commitment through the power of planned gifts—that's what the Legacy of Light Society is all about. There are a variety of giving options that qualify you for membership in the Society, and the Planned Giving and Endowments Team would be happy to discuss them with you. You can read more specifics on the back page of this newsletter.

Thank you for welcoming me this past year, and for your priceless gifts to the next generation.

Sincerely,



Judith E. Fagin



Judith E. Fagin

Smart Giving from IRAs

If you are age 70½ and older, you have the opportunity to make gifts to charity from your IRA. This type of gift is called a qualified charitable distribution (QCD).

Some helpful details about QCDs:

- Only donors age 70½ and older may make gifts from their IRAs.
- Eligible gifts may be made only from IRAs, not 401(k)s or other retirement plans.
- The limit on gifts is \$100,000 per person, per year.
- No charitable deduction is allowed, but donors avoid the income tax that would otherwise be owed on their IRA distributions.
- QCDs count toward an account owner's annual required minimum distribution.
- Distributions must be made from the IRA custodian or trustee directly to a qualified charity.
- Transfers can be made only to public charities, not donor advised funds, private foundations, or to fund charitable remainder trusts or charitable gift annuities.

If you're thinking of making a gift from your IRA, please let us know so that we may provide the proper receipt and express our sincere thanks. Feel free to call a member of our Planned Giving and Endowments Team if you have any questions about the benefits of making a qualified charitable distribution from your IRA.

In Memoriam

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

Frank J. Adler

Michael Bauer

Nancy Boyman

Samuel Frankel

Dr. Robert P. Frankenthal

Marlene Halperin

Hana P. Kovanic

Ruth Kupperschlag

Herbert J. Maletz

Manfred Steinfeld

Phyllis West

Lucy H. Young

Turning Paper Profits into Opportunity

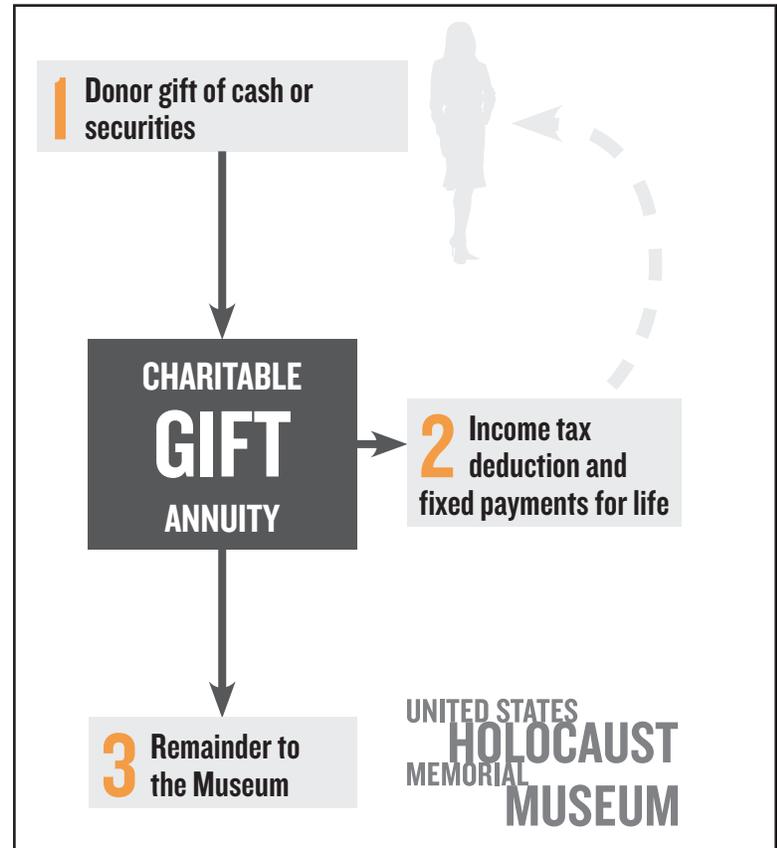
It took more than a decade for the Dow Jones Industrial Average to go from 500 to 1,000. Today, many investors have benefitted from a booming stock market, owning securities that have increased significantly in value.

Many of our friends find making gifts of securities to be a tax-wise way to support the Museum. Why? When you contribute appreciated stocks that you have owned more than one year, if you itemize you may be able to claim an income tax charitable deduction on your income tax return and incur no capital gains tax.

Ideas for giving stock

Give stock to the Museum – If you give stocks you have owned more than one year, you'll be entitled to a charitable deduction for the full market value of the stock and will avoid all capital gains taxes. When we sell the stock, the Museum owes no capital gains tax on the sale, allowing the full value of your gift to assist programs you support.

Keep payments for life from your gift to the Museum – You can contribute the shares but keep income for life by funding a charitable gift annuity with the Museum. Your annuity will be created using the stock's full current value, not depleted by any taxes. You will then receive fixed payments for life that can start now or can be deferred to a later date. You can also arrange payments for a spouse. You also may be able to claim a current income tax deduction for a portion of the value of your gift annuity.



More information

We would be happy to discuss the advantages available from using appreciated stock to make a gift to the Museum, including gifts that provide income. Simply contact a member of our Planned Giving and Endowments Team.

Keep Track of Your Beneficiaries

It's one thing to misplace your keys or forget a five-dollar bill in a coat pocket. However, if you can't recall the beneficiaries of your life insurance policies, retirement accounts, and other financial accounts, it's time to examine all of those documents. Not only is it important to know who you've named, you should also make sure the beneficiary designations are updated regularly so they are coordinated with your overall estate plan. Keep in mind you can name the Museum's Endowment as a beneficiary of such policies or accounts as well.

Do You Have a Question About Gift Planning?

If so, please let us know by returning the enclosed card. You may see your question and our answer featured in an upcoming newsletter!

PLACE
STAMP
HERE

BUSINESS REPLY MAIL

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



Meet Our Planned Giving and Endowments Team

The Museum's Planned Giving and Endowments Team is a group of dedicated professionals who have a passion for the Museum's vital work, as well as for helping you make securing its future a part of your personal legacy.

For more information on ways to accomplish this, please contact the appropriate staff member or visit ushmm.org/endowment.



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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. ©Copyright 2019 by SHARPE newkirk. All Rights Reserved. All photos courtesy of US Holocaust Memorial Museum except as otherwise noted. Portraits of Planned Giving and Endowments staff and Judith E. Fagin courtesy of Carl Cox.

Legacy of Light Society

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. Individuals who direct any type of gift to the Museum's Endowment are recognized as **Legacy of Light Guardians**.

I'm/We're ready to safeguard truth for future generations.

Please send me/us additional information about updating my/our estate plans to include a gift in my/our will to the Museum.

Please send information about ways to make gifts to the Museum that provide income, immediate tax savings and other special benefits. I/We understand payment rates and tax benefits are based on age(s) of payment recipients. My/Our date(s) of birth are ____/____/____ and ____/____/____ (second individual optional).

Please send more information about the Museum endowment and how to support the comprehensive campaign with a gift that will help secure the future impact of the Museum.

Please send information on making a contribution to the Museum's Annual Fund.

Many people like to include gifts to charity in their will to support causes that are important in their life. Have you considered making such a gift to the United States Holocaust Memorial Museum to benefit future generations?

I/We have already included the U.S. Holocaust Memorial Museum in my/our will or other estate plans.

I/We would consider including the Museum in my/our estate plans.

Name (please print)

Address

City, State

Zip

E-mail (optional)

Telephone (optional)

Questions? If you would like to ask a question to be answered by the Museum's Planned Giving and Endowments staff, please use the space below or email ghellman@ushmm.org or call 202.488.6591.

This information will be kept strictly confidential.

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

UNITED STATES
HOLOCAUST
MEMORIAL
MUSEUM

Planned Giving and Endowments
100 Raoul Wallenberg Place, SW
Washington, DC 20024-2126
202.488.6591

FOLD AND TAPE CLOSED, DO NOT STAPLE

Investing in Humanity: Museum Impact Funds

Some of the Museum's most outstanding programs and accomplishments have been made possible through planned gifts from people like you. A planned gift to the Museum's Endowment provides supporters the unique opportunity to advance our crucial work of ensuring the permanence of Holocaust memory.

If you would like to designate your planned gift to a specific area of our mission, the Museum offers four Impact Funds for targeted charitable giving:

The William Levine Family Institute for Holocaust Education Impact Fund

The Museum is the global leader in teaching why the Holocaust happened—and *was allowed* to happen. The goal of the Levine Institute is to develop new approaches to Holocaust education for students, teachers, and leaders that deepen understanding of personal responsibility, develop critical thinking, and lead to changes in attitudes and ultimately behavior.

The Jack, Joseph, and Morton Mandel Center for Advanced Holocaust Studies Impact Fund

The Mandel Center actively supports researchers and faculty worldwide in the field of

Holocaust studies to create the next generation of scholars who will ensure the continued growth and vitality of this field.

The National Institute for Holocaust Documentation Impact Fund

The National Institute for Holocaust Documentation was created to build, preserve, and make accessible the Museum's Collection of Record—one of the world's foremost collections of evidence on the Holocaust. We are in a race against time to collect the remaining evidence that, if not acquired now, will be lost forever.

The Simon-Skjodt Center for the Prevention of Genocide Impact Fund

The goal of the Simon-Skjodt Center is to build the emerging field of genocide prevention and to establish a global architecture for governments to create institutionalized structures, tools, and policies aimed at preventing and responding to genocide and other mass atrocities.

The Planned Giving and Endowments Team is here to help you find the most effective ways to achieve your charitable goals for the Museum. Simply contact one of our professionals.

Legacy of Light Society: By the Numbers

Help us Reach 1,000 Members! The U.S. Holocaust Memorial Museum recognizes legacy giving donors through the Legacy of Light Society. If you are interested in learning more about membership in this special group, please contact Celeste Z. Maier at 202.488.2634 or visit our web site at ushmm.org/endowment.

987

MEMBERS

51

NEW MEMBERS
TO DATE IN 2019

75

AVERAGE
MEMBER'S AGE

35

AGE OF YOUNGEST
MEMBER

103

AGE OF OLDEST
MEMBER