

OJCF Is Here To Help You Remember Life's Milestones

Donations via tribute cards are an excellent way to honour or memorialize a friend or relative, to commemorate a special occasion, or to acknowledge life-cycle events and holidays.

For a minimum contribution of \$18, OJCF will send out a personalized tribute card acknowledging your donation on the recipient's behalf.

Contributions are added to the fund of your choice, giving you the opportunity to help individual funds grow, increasing the amount available for distribution to the community.

Beautifully designed cards are available in bulk packages of 18 or more for a donation of \$15 per card.

Charitable receipts are issued for all donations.

Call 613.798.4696 (ext. 232) to order your cards today.

Ottawa Jewish
Community Foundation
21 Nadolny Sachs Private
Ottawa, ON K2A 1R9

Celebrating 150 Years of Happy Birthdays

When she speaks, Dena Gosewich has a twinkle in her eye, an infectious personality and a great sense of humour! So when asked why she and her husband Herb recently decided to open the Dena and Herb Gosewich Endowment Fund in support of the Jewish Federation of Ottawa's Annual Campaign, her response did not disappoint.

"To celebrate 150 years of Happy Birthdays," enthused Dena. "I turned 70 and Herb turned 80 and we live in a wonderful community. It was time!"

They settled in Ottawa and raised two children, Vicky and Mandy, and have two grandchildren, Benjamin and Rebecca. Herb and Dena, members of Beth Shalom, are well-known in the community and have built a full life as volunteers and retail entrepreneurs (Herb owned Ritchies sports shop and Dena

owned Next to Nothing, a lingerie store). Dena has been a committed volunteer and has served as the Women's Executive Director of the Jewish Community Council Vaad Ha'Ir for one year, President of B'nai Brith Women, Vice-President of the National Council of Jewish Women, Chair of the 20th Anniversary of Yom Ha'Atzmaut, as well as having served on numerous committees and organizing



Dena and Herb Gosewich

many community fashion shows on behalf of Israel Bonds and various

organizations.

Coming from Glasgow, Scotland, "for me personally, living in Ottawa and being part of this Jewish community is more than I had ever imagined. I love this city and this is our way to give back," says Dena.

Herb is a true Ottawa native; eldest son of the late Sam and Rae Gosewich. He has witnessed the growth of the community and is extremely proud of this city. He was a member of AZA B'nai Brith and has been a long standing member of the Ottawa Chevra Kadisha, as well as a member of the Beth Shalom Minyanaires Club.

To learn more about how you can leave a meaningful gift to the community through an endowed fund or other types of planned giving vehicles, contact the Foundation office at 613.798.4696 ext. 252.

OJCF Financial Update

OJCF's Investment Committee continues on as one of the hardest working committees of the board.

As all investors know, the past year has been tumultuous, and there has been no rest for the dedicated volunteers who give their time ensuring that the best choices are made on behalf of our community's precious assets.

The overall market

turnaround was reflected in the Foundation's portfolio returns early in the year, with March as the first month of positive investment returns.

At Dec. 31, 2009 the Foundation's returns are 13.8%, and we continue to watch market conditions very closely moving forward into the new year.

In addition to that daily mandate, the Investment Committee is constantly

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reviewing its overall operations.

Whether it's a review of the investment policy statement or the performance of our money managers, OJCF is constantly mindful that our actions are done with the best interest of the community and our donors in mind.

Reader Feedback

If you would like to receive this newsletter or any other correspondence from us electronically, please send us your updated email address.

Contact us via mail, email (info@ojcf.ca) or by phone (613-798-4696, ext. 248).

We appreciate any suggestions or comments you may have on the OJCF newsletter, website or programs offered throughout the year.

Welcome to OJCF 2010

I hope that the new year is off to a great start for you and your families. It is always exciting to begin anew, as the promise of a new year allows us to generally reinvigorate ourselves, and to plan for, and dream of what lies ahead. This is true for us not only personally and professionally, but as community builders as well.

As chair of the Ottawa Jewish Community Foundation I have been reflecting on the year ahead and working with the OJCF board and committee members to generate ideas to move us forward as an organization. However, even though the change of the calendar lends itself to thought and reflection – I am pleased to report that we are ready to back that all up with action.

We have started to see some truly exciting momentum build up within the OJCF. With the recent year-end results of the financial markets generally, and in the Foundation's own investment portfolio, we are seeing the start of a positive recovery in the financial world, moving beyond last year's global challenges. Buoyed by these results and by the drive to become more proactive in our approach, we are working hard to increase our

profile in the community. You will notice lawn signs around town which portray the meaningful stories of our donors.

We are also hard at work developing strategies to increase our profile on the web, further expanding our outreach capabilities and interactivity with donors.

We are mapping our plans to connect the younger generation to philanthropy and community support. Strategies are also underway to more meaningfully engage women philanthropists, a growing and vitally important segment of the philanthropic community. For the first time the OJCF has initiated a Fundraising committee whose mandate is to develop and implement new philanthropic strategies.

These are but a few of the ideas being brought to life by the OJCF, topics which you will undoubtedly be hearing more about as the year unfolds.

Beyond our own borders, things are also happening in the Jewish community foundation world that generate excitement. I recently had the chance to meet and share best practices with

representatives from Jewish community foundations from all across North America. I came away with new friends and new ideas – along with innovative twists to freshen some of our “old standbys”. This experience provided us with excitement to further expand our services and opportunities to engage our vibrant community.

Along with the potential for growth and change based on the initiatives described above, it is important to remind ourselves that the organization we have built in Ottawa over these past years promotes flexibility and adaptability while embracing that which has made us unique from the beginning.

Much like our experiences surrounding the start of a new year, holding onto our past while getting ready to tackle the future is a key theme that holds true at the beginning of the year and for the months ahead.



Harold Feder
OJCF Chair

Tips for Discussing Estate Planning With Your Spouse

Engaging in a meaningful conversation with your spouse about estate planning can help you and the people and causes you care about benefit most.

Why Plan Now?

If you delay strategic estate planning, you could miss out on opportunities to increase your assets, minimize taxes, benefit future generations and understand your spouse's wishes. Plus, discussing your goals now can reduce confusion and possible tension later.

Start Small

First, bring up estate planning

with your spouse and share why you think it's important. Then, together, you can choose a specific time to discuss your ideas.

Try these questions to kick-start the conversation with your spouse:

Assets: What do you own in terms of investments, savings, insurance policies, properties, businesses or other items of value?

Beneficiaries: Who would you like to receive your assets?

Charities: What nonprofit organizations would you like to support, and how will you provide that support and provide for family?

Advocates: Who should make financial or medical decisions for you when you can't make them for yourself?

Estate Planning Tips

- 1) Talking with your spouse before consulting a lawyer can make the process cheaper and easier.
- 2) Check out estate planning books to help you with initial brainstorming.
- 3) Gather and store all legal documents in a secure location.

Most importantly, you should set up an appointment with your professional advisor to discuss your options. They can help you decide which option(s) will work best for you and your family.

