



2024-2025 ANNUAL REPORT



Dallas Jewish Community
Foundation



Southwest Community
Foundation

About DJCF/SWCF

Founded in 1973, DJCF is the heart of Jewish philanthropy and legacy in our region. Our mission was enhanced 10 years ago with the introduction of our affiliate, Southwest Community Foundation (SWCF) to serve the needs of the secular community. Together, DJCF/SWCF serves as a vital partner in our community's philanthropic ecosystem, bringing together families, professional advisors, and nonprofit organizations.

Our Mission

To be your partner and trusted expert in charitable giving and effective philanthropy by:

- Empowering our community's charitable vision
- Safeguarding our community's resources
- Building enduring legacies



Our Vision

Securing our community's future by fostering a culture of strategic planning and giving today.

Our Values

- Collaboration
- Compassion
- Confidentiality
- Education
- Inclusive Philanthropy
- Jewish Traditions
- Trust

“We strengthen our community through innovation, collaboration, and education.”

- Megan Hyman

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Letter from the Chair

Dear Friends,

It is my privilege to share with you the first DJCF/SWCF Annual Report, reflecting on the Foundation's remarkable growth in 2025 and highlighting the collective impact of our work over the past year.

As Chair of the Board, one of my priorities is to increase awareness of the Foundation and the vital role we play in strengthening the Dallas Jewish community. Through the strategic relationship between the Dallas Jewish Community Foundation (DJCF) and its affiliate, the Southwest Community Foundation (SWCF), we have expanded our reach and deepened our impact—serving a broader, more diverse community while remaining rooted in Jewish values and traditions.

Together, DJCF and SWCF offer unique opportunities to amplify philanthropy. We are proud to provide services that help families, advisors, and organizations achieve their goals while supporting the causes that matter most.

The Foundation stands at the intersection of professional advisors, philanthropically minded families, and nonprofits making a difference locally and around the world. Together, we inspire generosity, steward legacies, and ensure that each donor's values are reflected in the impact of their giving.

As you read this report, I hope you discover something new about the ways DJCF/SWCF serves as a trusted partner in philanthropy. I invite you to contact me or our dedicated team to explore how we can work together to build a stronger future for our community.

With gratitude,



Mike Weinberg
Chairman, Board of Trustees



Our Board

Our volunteer Board of Trustees serves as the guiding lens that brings the Foundation’s vision into focus. Each trustee contributes unique insights, experiences, and leadership that, together, create a powerful and purposeful direction. Their stewardship ensures our mission remains vibrant, inclusive, and responsive to the evolving needs of the community. With deep gratitude, we honor their commitment to shaping a future full of possibility.

Mike Weinberg
Chair

Stuart Prescott
Vice Chair

Paul Michaels
Vice Chair

Sandy Kaufman
Treasurer

Laura Burstein

John Cohn

Rusty Cooper

Andy Dropkin

Cyd Friedman

Lisa A. Genecov

Darrin Goldin

Emily Hargrove

Dot Haymann

Todd Healy

Mike Hirsh

Rick Lacher

Debbie Malafsky

Lisa Newman

Paula Romberg

Jon Ross

Peggy Tobolowsky

Louis Zweig

Rabbi Mordechai Harris
Ex Officio

Megan Hyman

Ex Officio

Chairman’s Award

The Chairman’s Award is presented annually to an individual whose exceptional leadership and dedication have significantly advanced the mission and values of DJCF/SWCF. Recipients are selected by the Chair of the Board in consultation with the President and CEO, based on their outstanding contributions to community philanthropy and impact.

Todd Healy

Founder and Owner of C3 Financial Partners, Todd helps clients preserve family wealth and business success through life insurance planning. He serves on the SMU Planned Giving Council, the Board of Trustees for the Dallas Jewish Community Foundation, and advisory councils for Parkland Foundation, Communities Foundation of Texas, and The Dallas Foundation. Todd and his wife, Libby, recently celebrated 50 years of marriage and enjoy time with their two children, four grandchildren, and horses at their East Texas home.



Photo courtesy of the Healy Family

Letter from the President and CEO

Dear friends,

When I joined the Foundation team three years ago, we set an ambitious goal: to evolve the organization to better serve the Dallas Jewish community. Our progress towards that vision has required collaboration, trust, and tremendous effort from our volunteers, trustees, and staff. It is my pleasure to celebrate our community, our fundholders, and the collective impact of our work with you.

In FY2025, which concluded in July, the Foundation exceeded \$40 million in donor-advised grantmaking, supporting hundreds of organizations across the country and making a global impact. We also partnered with families, professional advisors, and nonprofits to open dozens of new funds, while continuing to grow our assets under management.

These accomplishments are made possible by our talented staff, whose teamwork and commitment have allowed us to strengthen operations, embrace new technology, and lead innovation in grant processing for our sector. Their efforts ensure we are prepared to meet the evolving needs of our community for generations to come.

Within this report, you will find highlights of our work with DAF holders, the impact of legacy gifts, stories from scholarship recipients, and more. Together, these efforts reflect our mission: to serve as a trusted home for hundreds of individual and nonprofit endowment funds—providing stewardship, education, philanthropic guidance, innovative solutions, and a safety net for the community, now and forever.

Our fundholders are the heart of this mission. Like the shifting patterns of a kaleidoscope, their diverse passions, values, and visions come together to create something vibrant, beautiful, and ever evolving. Their generosity reflects the dynamic spirit of Jewish philanthropy - one that adapts, responds, and shines in new ways with each turn.

We are grateful to each of you, our partners, supporters, and community leaders, for helping us advance this mission. The successes of the past year reflect not only the dedication of our staff and trustees, but also the generosity and vision of those who choose to invest alongside us in a vibrant Jewish future.

As we look ahead, we remain committed to going from strength to strength, using our resources to repair the world throughout Dallas and beyond.

With gratitude,



Megan Hyman
President and CEO



Our People

The staff of the Foundation bring together diverse perspectives, talents, and passions to create a vibrant, lasting impact in our community. Each team member plays a unique role, and together they form a dynamic mosaic of service, innovation, and care.



Megan Hyman
President and CEO



Jerry Blair
Chief Finance Officer



Sarah Golman
Chief Operating Officer



Mona Allen
Chief Impact Officer



Servando Sanchez
Director of Finance



Risa Gross
Director of Impact



Regan Klinke
Finance & Operations Manager



Lisa Wile
Executive Assistant



Mary Vaughan
Director of Fundholder Services



Shalon Sanders
Director of Philanthropic Relations

Our 2025 Impact

Our team provides personalized guidance – from estate and tax planning to nonprofit sustainability – always with confidentiality and trust. Every dollar is directed with care to create lasting impact.

For over 50 years, we've simplified charitable giving, helping our fundholders excel at giving back:

\$1.8MM in endowments & scholarships granted to over 300 nonprofits and students

Endowments are permanent funds invested for the future, providing steady, long-term support to the organizations you love. You can also create scholarships that help students pursue their academic and professional dreams.

\$39MM in donor-advised grants to nearly 1,700 nonprofits

Think of a donor-advised fund (DAF) as your charitable checking account — flexible, tax-smart, and easy to use. You contribute, receive an immediate deduction, and recommend grants to causes you care about — from synagogues and summer camps to food pantries and museums.

\$384MM in charitable assets under management

Offering fundholders a variety of investment options to choose from, tailored to your individual risk tolerance and liquidity needs.



Here in Times of Crisis

Since our founding, we've served as a financial backstop in times of crisis, providing bridge loans, guaranteeing bonds for capital projects, and distributing over \$4 million in emergency grants for natural disasters, the global pandemic, and unmet community needs.

In 2023, following the October 7 attacks in Israel, we mobilized swiftly to facilitate over \$3 million in urgent support for Israel, Jewish security, and efforts to combat antisemitism worldwide, reflecting our enduring commitment to resilience and unity.

Like the shifting patterns of a kaleidoscope, our community's needs evolve - and the foundation remains a constant source of strength and support.

over
\$4MM
in local emergency grants

over
\$3MM
in urgent support after 10/7

Our Work with Families

Reflections of Legacy: The Miller Family

In 1999, Julie and Scott Miller established a donor-advised fund at DJCF, creating a streamlined way to donate appreciated stock and simplify charitable tax reporting. Their fund became a hub for supporting causes close to their hearts, including many Jewish organizations, alma maters, and other nonprofits that hold personal meaning for their family. Scott's leadership as a past DJCF trustee, his involvement with the Goldring/Woldenberg Institute of Southern Jewish Life (ISJL), participation in other organizations, and the family's commitment to Jewish camp continue to shape their philanthropic vision.

In 2007, they created an endowment fund to complement the Millers' estate planning. This fund serves as a reservoir for charitable assets that DJCF will manage in perpetuity, ensuring that more than 10 Jewish and secular organizations receive ongoing support. Scott and Julie regularly revisit their beneficiary list, adjusting distributions as their community engagement evolves—ensuring their legacy remains as dynamic as their lives.

Nearly 20 years later, the Millers took a bold step in multigenerational philanthropy by establishing donor-advised funds for each of their children. DJCF hosted a family meeting to introduce the mechanics of fund management, investment growth, and spending policies. Each child now recommends grants annually that are aligned with their personal interests. It was a moment of shared learning, values, and vision - an inspiring glimpse into the future of Jewish giving.

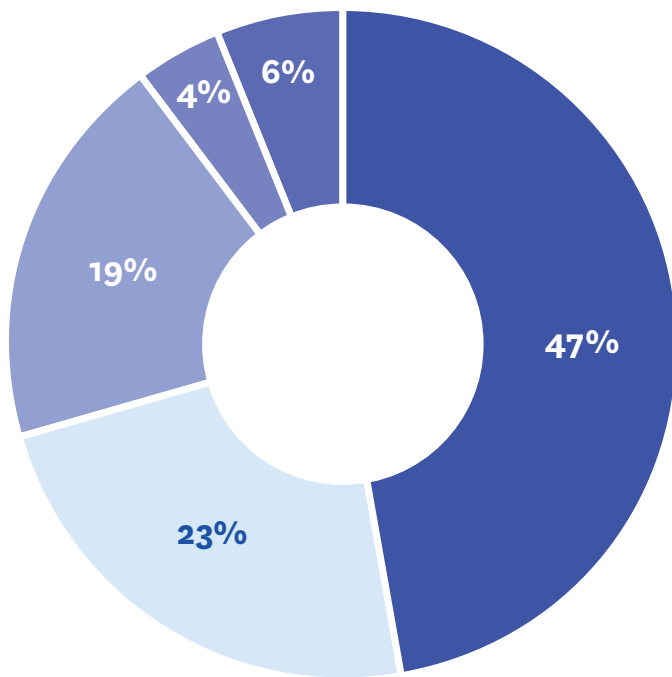
Scott's role on the ISJL board sparked a broader conversation about endowing support for Jewish communal agencies. DJCF has partnered with leaders like Scott to promote board education and demonstrate how endowments can create lasting institutional strength. In fall 2025, DJCF co-hosted an event with ISJL to spotlight the Miller legacy and the agency's vital work.

The Miller family's story is a kaleidoscope of impact - each piece reflecting purpose, love, and leadership. Their legacy is not just enduring, it's evolving.



The Miller family's philanthropic journey reflects the vibrant, evolving nature of legacy, each facet a reflection of their values, passions, and commitment to community.

Fundholder Impact: DAFs



Fundholders distributed 15% of their assets from DAFs to charities across a wide range of causes.

Our fundholders represent many facets of the philanthropic spectrum (Breakdown of Funds by size)

- \$25,000 and under: **47%**
- \$25,001 - \$100,000: **23%**
- \$100,001 - \$500,000: **19%**
- \$500,001+: **4%**
- \$1,000,001+: **6%**

\$158MM
DAF assets under management

\$26K
Median account balance

591
Number of DAFs

Donor-advised Fundholders' Top Charities in FY25, as measured by number and dollar amount of grants:

of Grants

- Jewish Federation of Greater Dallas
- Temple Emanu-El
- Congregation Shearith Israel
- Jewish Family Service of Greater Dallas
- Dallas Holocaust and Human Rights Museum

\$ of Grants

- Akiba Yavneh Academy
- Jewish Federation of Greater Dallas
- Jewish Family Service of Greater Dallas
- Dallas Holocaust and Human Rights Museum
- Brown University

Fundholder Impact: Endowments & Scholarships

Revealing new patterns with every turn, endowments at the foundation reflect the dynamic values of our donors. These permanent funds ensure that the causes closest to our hearts – Jewish education, social services, arts and cultural institutions, and more – receive sustained support across generations.

We serve as the trusted steward of hundreds of family endowment and scholarship funds created as part of a thoughtful strategic philanthropic planning discussion. Your family determines the causes or issue areas you want to support, and our dedicated team handles the ongoing administration and awards – now and forever.



\$60MM

in endowment & scholarship AUM

350

funds

\$1.8MM

in distributions

**L'dor v'dor is Hebrew for “from generation to generation.”
This concept speaks to the Jewish value of tradition and
sharing of our history from one generation to the next.**

89 Students

of all backgrounds
received a scholarship from
DJCF/SWCF in FY25



From a young age, my parents instilled a simple but powerful lesson: education comes first. They taught me that knowledge is the key to opportunity, and hard work in the classroom paves the way for success.

- Cody Le, New York University

\$285K

in scholarship grants to
deserving students of all
backgrounds and faiths

Each scholarship awarded through the Foundation offers a unique lens into a student's potential. Since 1991, donors have partnered with us to establish scholarship funds based on financial need, academic merit, extracurricular involvement, and community service. Through generous donor support, we provide scholarships to students of all ages and stages. These funds help students from diverse backgrounds access transformative opportunities—from attending Jewish summer camps to studying abroad in Israel—creating a vibrant mosaic of future community leaders. Our scholarship program is a cornerstone of the Foundation's mission to foster opportunity, equity, and continuity within the Jewish community and beyond.



Education is a powerful equalizer that shapes my future by providing me with essential knowledge, skills, and connections. As I invest in my education, I am not only enhancing my future prospects but also contributing to a better society.

- Nyic'Quavayion, Grambling State University

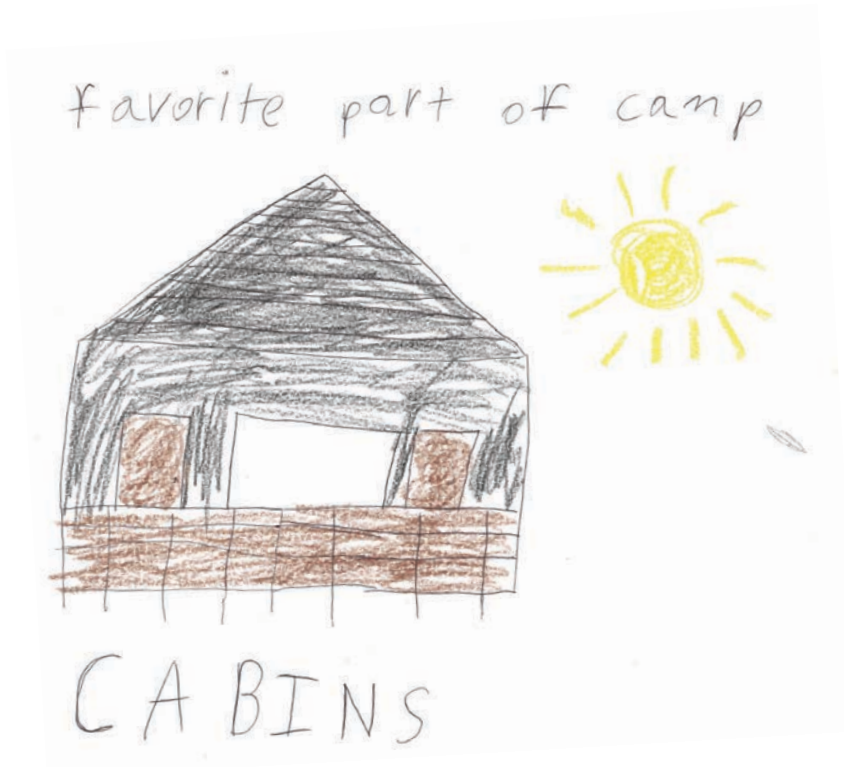


Reflections of Legacy

The Berger Family

In 2003, Dr. Israel Berger established a fund to benefit the Aaron Family Jewish Community Center (JCC) while honoring and memorializing his late wife.

The Pauline M. Berger Special Needs Camp Fund provides an annual scholarship to the JCC for children with special needs who might otherwise be unable to attend camp. To date, the fund has awarded more than \$110,000 in scholarships.



Photos courtesy of the Aaron Family JCC

Thank you so much for helping me go to camp this summer! It's my first time going to sleepaway camp, and I'm really excited (and a little nervous too). I can't wait to try all the activities, meet new friends, and grow in my learning. It means a lot to me and my family that you made this possible. Thank you again for your kindness!

**Sincerely,
A Grateful Camper**

Reflections of Legacy

The Michaels Family

Paul Michaels currently serves as Vice Chair of the Board of Trustees for DJCF/SWCF. His wife, Lee, recently concluded her term as Chair of the Board for the Dallas Holocaust and Human Rights Museum.

In 2017, the Michaels family established a donor-advised fund with the Southwest Community Foundation. As an interfaith household, they were drawn to SWCF's flexibility and inclusivity, which allowed their philanthropy to reflect the multifaceted nature of their values—both within and beyond the Jewish community.

Their commitment deepened in 2023 with the creation of a college scholarship fund to support Native American and Indigenous students. Each year, two graduate or undergraduate students receive \$3,000 awards to advance their academic journeys.

In 2024, a member of the scholarship review committee shared news of the Michaels' scholarship fund with Joshua Arce, CEO of Partnership With Native Americans (PWNA). This sparked a meaningful connection, and by early 2025, PWNA joined DJCF/SWCF as a new nonprofit agency partner, seeking guidance on stewarding several significant legacy gifts.



Photo courtesy of the Michaels Family

Lee and Paul Michaels embody the spirit of generosity, leadership, and community engagement. Their vibrant contributions of time, talent, and treasure have created ripples of impact across Dallas and beyond.



Photos courtesy of Partnership with Native Americans.

Sign the Jewish Future Promise

Leading the Jewish Future Promise (JFP) cause as volunteer leaders for our Dallas community are DJCF Trustee Mike Hirsh and former Jewish Federation of Greater Dallas Board Chair A.J. Rosmarin.

We are proud to promote the Jewish Future Promise; a global initiative designed to preserve and enrich Jewish heritage for future generations. The Promise asks signers to make a moral commitment to share Jewish stories, values, and traditions with family and friends—and, if any charitable contributions are made upon passing, to allocate at least 50% to Jewish causes and/or the State of Israel.



“The Jewish Future Promise creates a vector for charitable giving toward your priorities for the rest of your life. It’s because of that approach that we signed on, told our kids, they told their kids, and now all 21 of us are Jewish Future Promisors.”

- Joan and Bernard White

**You have the power to
secure the Jewish Future**



**Jewish Future
P R O M I S E**



Our Work with Nonprofits

Our partnerships with local nonprofits create a mosaic — each piece essential to the beauty and strength of the whole. DJCF/SWCF helps nonprofit organizations build capacity through education, consulting, and top-notch professional investment management services for custodial agency endowment funds.



Photos courtesy of Jewish Family Service of Greater Dallas.

\$147MM
Nonprofit Custodial AUM

370
Accounts

50
Partner Agencies



Nonprofit Partnerships & Programs

Texas Jewish Arts Association

The foundation's offices are greatly enhanced by a special partnership with our friends at the Texas Jewish Arts Association, which curates stunning exhibits featuring works from its talented local member artists, transforming the DJCF/SWCF office into a gallery bursting with creativity.

Each exhibit is celebrated with an open house, inviting fundholders and friends to experience the art firsthand. This partnership does more than beautify the space: it builds bridges. It introduces new audiences to Jewish artists across Texas. And the impact is tangible: several pieces have found new homes thanks to the exposure, with artists gaining both recognition and revenue. Even better, 20% of each sale goes directly to support TJAA's mission, meaning every purchase helps fuel the future of Jewish art in Texas.



Lion of Judah Endowments propel the Jewish Federation of Greater Dallas' Annual Campaign

Lion of Judah Endowments (LOJEs) are powerful commitments made by women to ensure the future of Jewish philanthropy in Dallas and beyond. By establishing a LOJE, donors perpetuate their annual Lion of Judah gift to the Jewish Federation of Greater Dallas (JFGD) through a permanent endowment. These endowed gifts provide lasting support for vital programs and services, helping to sustain and grow the Federation's impact across generations. DJCF has worked with dozens of women to create these unique legacy funds.



Unlocking the Power of Legacy with Dallas Hebrew Free Loan Association

Jane Larkin of the Dallas Hebrew Free Loan Association and DJCF CEO and President, Megan Hyman, hosted a gathering for former DHFLA leadership and top donors to hear firsthand insights from Ann Kahn, a community leader, on how she is introducing her children and grandchildren to tzedakah. The discussion explored the many ways donors can support nonprofits—from their IRA or a donor-advised fund (DAF) to more complex and sophisticated giving vehicles that the Foundation offers to its partner organizations.



Your Legacy. Our Jewish Future

This educational initiative brought together six Jewish organizations in a groundbreaking 10-week cohort focused on strengthening gift planning and endowment building. The program encouraged community donors to bring their philanthropy home—supporting the local causes that make our community shine. This collaborative effort reflects a shared commitment to securing the future of the Jewish community through strategic philanthropy and legacy giving.



It's not just collaboration, but it's communication. We want to create a community dynamic where everyone feels that their contribution matters.

- Cathy Barker, President and CEO of JFS Dallas

Our Work with Advisors

Professional advisors are the skilled hands that help shape the philanthropic patterns our donors envision. The foundation works alongside advisors from the legal, accounting, insurance, wealth management, and investment fields to help individuals and families reach their charitable goals. Under our SWCF organization, we also provide private-label philanthropic programs for advisors to manage their clients' charitable giving funds.

As the sole philanthropic services provider in North Texas rooted in Jewish values, we are proud of our partnership with donors, nonprofits, and professional advisors. We've established a reputation as a trusted extension of our fundholders' professional advisory team.



Professional Advisory Committee

This important committee is responsible for strategic direction and oversight of the foundation's work within the professional advisor community of North Texas.

Annual Professional Advisors Seminar

For three decades, DJCF has offered an annual event for advisors to learn about new developments in charitable and estate planning.





Supporting Women Attorneys Network (SWAN)

For half a decade, SWAN has provided a regular opportunity for female trust and estate planning attorneys to share best practices, learn from one another, and network.

Happy Hour & Advisor Roundtables

SWCF hosts quarterly Advisor Roundtable sessions designed to connect advisors, share cutting-edge practices, and strengthen professional skills. To kick off the new year, SWCF hosts a happy hour as an opportunity to network and celebrate before diving into a year of collaboration and growth. We're proud to bring together our talented advisor network for these engaging events.



If philanthropy is not front of mind, it's not part of the conversation, but when it is, we see more people including giving in their estate plans, and that benefits the entire community.

- Lisa Newman

The Meyer L. Bodoff Memorial Award

The Meyer L. Bodoff Memorial Award has been generously endowed by Stanford M. Kaufman Family Fund of the DJCF. Meyer L. Bodoff served as President and CEO of DJCF/SWCF for 12 years. He saw the Foundation through significant change and growth, always guided by his desire to leave the world a better place than he found it. The Meyer L. Bodoff Memorial Award honors the fact that he did just that.

The 2024 recipient was Larry Schoenbrun, a long-term supporter of the Foundation and Life Trustee. He has also served as Chair of the DJCF/SWCF Board and on many Foundation committees. He has been involved with many nonprofit organizations, including the Anti-Defamation League, CHAI: Community Homes for Adults, Inc., the Dallas Holocaust and Human Rights Museum, the Jewish Federation of Greater Dallas, and the Texas Hillel Endowment Foundation at UT Austin.



Photo credit: Larry Schoenbrun



Larry has been a passionate advocate in the nonprofit community on the importance of setting up endowment funds.

- Megan Hyman

Safeguarding our community's resources

At DJCF, we believe that investing in our community today creates a brighter tomorrow. Core to our mission is to support sustainable growth and positive change by directing investments that drive social good, economic development, and long-term prosperity for all.

That's why we're proud that values-based investing is incorporated into every pooled fund offered by the foundation. These offerings provide a distinct value-add for our Fundholders, giving them the opportunity to achieve compelling returns and maximize their impact with their investments, in addition to their active grantmaking.

By partnering with us, your investment doesn't just grow financially, it creates meaningful change in the lives of individuals, families, and nonprofits within our community. The Foundation's investment portfolio is managed by Graystone Consulting, under the guidance of the Foundation's Investment Committee.

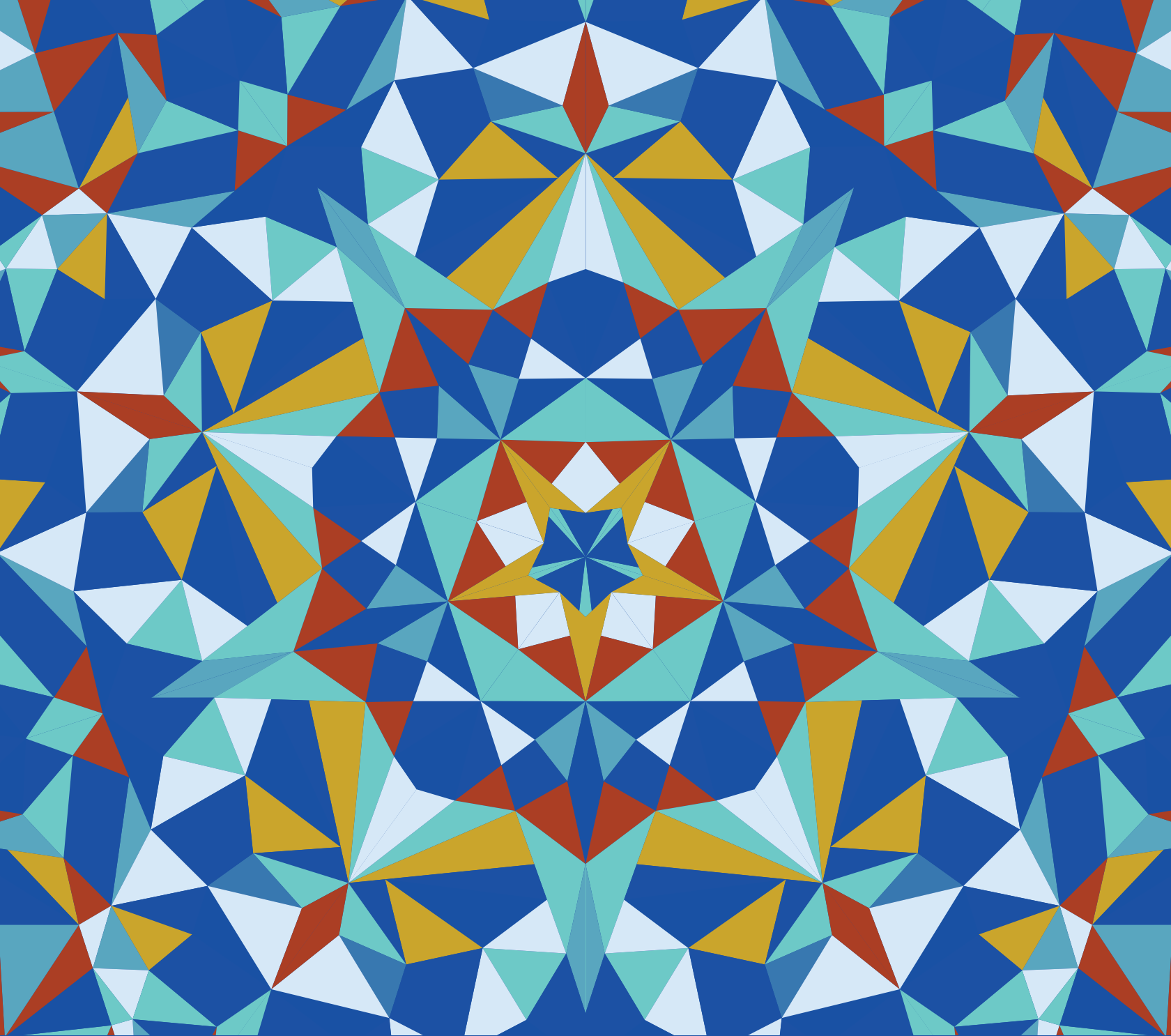
Investment portfolio options and monthly performance is available at djcf.org/investments.



Looking Ahead: Join Us in Shaping the Future

As we reflect on our collective impact of the past year, we are reminded that the strength of our Foundation lies in the relationships we build — with families, advisors, nonprofits, and community leaders who share our vision for a vibrant Jewish future.

Whether you're just beginning your philanthropic journey or seeking a trusted partner to steward your legacy, DJCF/SWCF is here to guide, support, and amplify your impact. We invite you to start a conversation with us. Let's explore how your values, passions, and generosity can shape meaningful change - today and for generations to come.



Let's Talk

Contact us to discuss your philanthropic objectives with our team.

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