



Reb Zalman Endowment Fund
Rabbi Zalman Schachter-Shalomi, August 28, 1924 - July 3, 2014

Rabbi Zalman Schachter-Shalomi, best known as “Reb Zalman”, was the founder of the Spiritual Eldering Institute, and a mentor to members of The Sage-ing Guild, which in 2012 became Sage-ing International (SI). He was a founder of the Jewish Renewal movement and a participant in ecumenical dialogues throughout the world. His belief in the universality of spiritual truth led him to study with Sufi Masters, Buddhist teachers, Native American elders, Catholic monks, and humanistic and transpersonal psychologists. He was the author of From Age-ing to Sage-ing, with Ronald S. Miller, and was the author of more than 150 books and articles throughout his lifetime.

What is the Reb Zalman Endowment Fund?

The Reb Zalman Endowment Fund (the Fund) is a protected pool of money donated by our members and other Reb Zalman supporters that is invested to produce income without invading principal. It makes money from investments, and the money it makes comes back to SI to support its programs and activities. The principal is intended to grow year after year, so that it becomes a significant source of financial security for us in the future. The Fund can help us weather lean or even dangerous times, such as a recession, and in healthy times it can help us launch new projects.

Members and supporters of SI are encouraged to remember us in their estate plans once their loved ones are taken care of. The Fund relies primarily on planned giving (giving through a bequest in your will), although donations can be made at any time.

How Can I Support The Reb Zalman Endowment Fund?

You can fill out a [Planned Giving Intention Form](#) to make your intentions known to SI. Contact the [Chair of the Endowment Committee](#), with questions or for more information. Gifts to the Fund can take many forms:

- Cash or securities
- Bequests
- Insurance policies or retirement plans
- Real Estate
- Charitable gift annuities

Any gifts to the Fund should be relatively liquid (i.e., not difficult to convert to cash for investment).

How Do I Become a *Zalman Fund Benefactor*?

Individuals who have informed the Endowment Committee that SI has been named in their estate plans are celebrated as [Zalman Fund Benefactors](#). Anonymous donors are also welcomed.

How is Income from the Fund Used?

The use of annual Fund income will be determined by the SI Coordinating Circle in its budgeting process.

Who Manages the Fund and How Is It Invested?

The Reb Zalman Endowment Committee is charged with oversight of the Fund as well as promoting its growth. A dedicated Sage-ing International brokerage account receives donations to the Fund and donations are invested in socially conscious investments at the direction of the Endowment Committee.

How Do I/We Specify My Bequest in My Will?

Please ask your attorney to specify in your will that the bequest is to the Reb Zalman Endowment Fund of Sage-ing International in a specific amount or a percentage of the estate or asset. It is understood that you can modify your bequest at any time if necessary.

Zalman Fund Benefactors

The donors listed below (in order of when their giving intentions were received) have either made a cash donation or a bequest (or both) to the Reb Zalman Endowment Fund. We honor these Benefactors and gratefully acknowledge their donations and bequests. When received by Sage-ing International, these gifts are invested in socially-responsible funds with Fidelity, and the annual income from the investments is made available to support vital activities identified by the Coordinating Circle of SI. We thank these Benefactors for their critical support of SI's mission for Elders around the world.

Reb Zalman Benefactors (in order of date of receipt of gifts and/or bequests)

2023

Gary and Charlotte Carlson (cash and bequest)

Marvin Israelow (cash)

Judith Helburn (cash and bequest)

2024

Carol Scott Kassner (bequest)

Brian Jones (bequest)

Pat Hoertdoerfer (bequest)

Susan Freiband (cash)