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## INTRODUCTION

# The State of Philanthropy

A PORTION of my salary as a professor is paid out of an endowment, donated three decades ago by a small group of funders to my public university. My children attend a public magnet school with a rooftop garden, computers, and books contributed by corporations, businesses, and individuals. The local newspaper I read every morning is owned by a charitable foundation, the public radio station I tune in to reminds me on the hour that private family foundations support it, and my city's art museum is filled with galleries named after its supporters. Not a single day in my life passes untouched by philanthropy. The same is true for most Americans, whether they recognize it or not.

When I try to account for the scope of philanthropy in my life, I also have to acknowledge the particular contribution of Jewish philanthropy. Add to the above ledger my graduate education, multiple trips to Israel, my children's first summer at Jewish overnight camp, hundreds of books I have read to them, and much more, all supported in entirety or large part through grants from Jewish private family foundations, community foundations, and public charities. The ubiquity of Jewish philanthropy in my life is also not unique. Almost any person who affiliates with an American Jewish community could make a similar accounting of the benefits they have reaped from Jewish philanthropy.

If I were to tally philanthropy's contributions to my own life, I would confront a startlingly large figure. And if I were to try to calculate what proportion of that total figure could be classified as Jewish philanthropy, the sum would still be substantial, but the process of categorization would be riddled with unanswerable questions. When a Jewish family donates to an art museum, or endows a professorship—such as the one I hold—for the study of Jewish history at an American public university, is it engaging in Jewish philanthropy? Or when a non-Jewish family donates to a cause in Israel, is that Jewish philanthropy?

No wonder, then, that over the last decade, reports of the total value of American Jewish philanthropy have varied from \$24 billion to \$46.3 billion, depending on the criteria researchers use to define it. Even qualitative measures of American Jewish philanthropy run into similar problems, as researchers try to decide what makes an individual donate to a “Jewish” cause as opposed to an “American” one. Similarly, when investigative journalists probe the recesses of American Jewish philanthropy, they, too, confront these same definitional problems.<sup>1</sup>

A historian of American Jewish philanthropy might feel pressed to define exactly what it is, a task that several other researchers have attempted. I wrote this book, however, because I think there is a better way to approach the topic. The more I have learned about American Jewish philanthropy, the more I have come to see that its significance has been grossly underestimated in blinkered attempts to account for it as distinct from American philanthropy or the American state.

When I began to explore the history of American Jewish philanthropy, I realized that it was leading me to examine the historical formation of the core ideologies of American democracy and capitalism. Never far below the surface of the institutions and practices of American Jewish philanthropy was a persistent puzzle of American statecraft: how to balance the interests of democracy with those of capitalism. Thus, to understand American Jewish philanthropy, I had to study the laws and policies that facilitated private means to act as a proxy for the public good. Over time, the institutions of the American state enriched private resources with public support. In squaring its obligations to a democratically empowered public and to capitalist growth, the state increasingly resolved that the good of the whole could be met best by not only freeing but, indeed, subsidizing private interests and markets. In this way, American democracy invested in capitalism. More than the sum of dollars and their donors and more than any rigid distinction between Jewish philanthropy and American philanthropy, what I have come to characterize as the American Jewish philanthropic complex emerged at the intersection of the American state—the laws, policies, agencies, officials, and practices that regulated the public good and protected private freedoms—and Jewish communal aspirations in the United States.

A complex generally refers to something that brings together several parts into one formation, sometimes so successfully that we lose sight of its constituent pieces or its process of construction. This is exactly what I mean by the American Jewish philanthropic complex. With its beginnings in the

nineteenth and early twentieth centuries and its full maturation over the second half of the twentieth century, it brought together the shifting terrain of American political economy and statecraft with the technical and psychological task of provisioning for American Jewish life. The parts—policies, political and economic ideologies, and cataclysmic events that reshaped global Jewish life—resolved into a complex, made to appear timeless and whole as much by the efforts of its institutions, leaders, and supporters as by its validation of late-twentieth-century American statecraft.

In 1961, during his last days in office, President Dwight Eisenhower delivered his now famous military-industrial-complex speech. In it he observed the ascendancy of private interests (specifically, those of military producers) within government circles and public policies. He admonished that democratic principles would suffer should the trend continue. In this same period, a similar dynamic could be observed in the historical development of American philanthropy. Even with new regulatory measures enacted in the following decades, philanthropic institutions were nourished by and fostered an array of policies that empowered private entities to exercise governance over the American public. On one level, then, the American Jewish philanthropic complex was just one manifestation of an American philanthropic complex, which was simply a manifestation of the private control over public life about which Eisenhower had warned.<sup>2</sup>

A complex is, also, complicated, and the American Jewish philanthropic complex was as well. With their countless acronyms, name changes, mergers, and ties to global Jewish philanthropic efforts, American Jewish philanthropic institutions were organizationally and historically intricate. More than just an indication of their internal complexity, however, the nature of these institutions also reflected the regulatory complexity of American laws and policies in the twentieth century. Similar to other philanthropic institutions, Jewish ones crafted technologies and employed new classes of professionals to help them adhere to regulatory standards, simultaneously abiding by and interpreting them.

Finally, the word complex brings to mind a set of psychological patterns. This, too, must be accounted for in order to understand the American Jewish philanthropic complex. As it developed, the complex served as a channel for the shifting anxieties, vulnerabilities, and uncertainties that many American Jewish leaders experienced. While they struggled to raise funds to sustain their institutions, they also worried about the deleterious perceptions their efforts might fuel. Few Jewish philanthropic leaders could ignore the ongoing threat

posed by long-standing antisemitic suspicions that equated Jewish financial activity with Jews' alleged exploitative and conspiratorial inclinations. Visible Jewish wealth, while a boon to communal endeavors, could also stoke antisemitic ideas and behaviors.

The history of the American Jewish philanthropic complex is both a broad chronicle of the complicated and ever-shifting arrangements of the American state and a very specific story about how these shifts repositioned Jewish communal institutions into state actors. It draws attention to how the leaders of those institutions interpreted American laws and policies to address their changing needs, desires, and fears. When we account for American Jewish philanthropy as a governing instrument—reflecting the state and, also, transforming it—we can more precisely apprehend its significance to American life.

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The majority of Jews arrived in the United States during a period of incredible expansion over the nineteenth and early twentieth centuries. Territory, population, and industrial production all grew massively in this period, as did the conception of an American national identity that included a greater diversity of citizens than ever before. The largest wave of Jewish immigration coincided with the migration of millions of other newcomers to the United States and, also, followed on the heels of the passage of the Thirteenth, Fourteenth, and Fifteenth Amendments, which abolished slavery and extended, in law though not necessarily its application, citizenship to “all persons born or naturalized in the United States.”<sup>3</sup>

In the late nineteenth and early twentieth centuries, American Jews established philanthropic institutions to channel private Jewish dollars to serve global Jewish populations and, also, to meet domestic communal needs. Similar to other Americans, Jews organized the means to distribute private capital within the parameters of evolving rules and regulations issued by state and federal governments. The experience of building philanthropic organizations exposed them to national debates over the extents of capitalism, its ability to serve broad public needs, and the limits of democracy in the face of a rapidly diversifying American population. The spectacular growth of philanthropic institutions over these years could be interpreted as proving the felicitous co-existence of capitalism with democracy, as an ever-wider array of Americans divested themselves of their private earnings for the public good. However,

that same growth could threaten a democratic process, as private entities took hold of their capital power to serve the public as they saw fit.

The American Jewish philanthropic complex developed in the context of the American state's expansion and its attendant and varied efforts to reconcile democratic protections with capitalist growth over the course of the twentieth century. For historians of American Jews, my invocation of the American state as central to Jewish life may feel counterintuitive. The work of American Jewish history has rested on a foundational claim that Jews as individuals gained full and unmitigated citizenship rights in the United States, unlike under other ruling regimes that approached Jewish emancipation as a process, with fits and starts and myriad regulatory experiments. Accordingly, American Jewish historians tend to maintain that Jews as a collective have not experienced state-based regulation to any significant degree in the United States, a conclusion that continues to fuel an exceptionalist approach to the field. In such a framework, the American state only matters insofar as it was so exceptionally different from other state apparatuses. Under the sway of this approach, American Jewish historians have based their research questions on a presumption about the American state—namely, its radical difference from other states—but not on a critical examination of the effects it had on Jewish life.<sup>4</sup>

For a long time, American Jewish historians were not alone in eschewing the American state as a relevant category of analysis. In his now classic 2008 article entitled “The Myth of the ‘Weak’ American State,” William Novak called fellow American historians to task for uncritically reproducing an ideological fashioning of the US government as small and limited, giving its citizens rights and then setting them free. He argued that this portrayal, core to Cold War politics, was contrary to the twentieth-century history of American state growth, tracked through the expansion of agencies and bureaucracies and the rise of interventionist social and economic policies. Following Novak's lead, historians over the last decade have produced a bounty of new scholarship about sexuality, immigration, military service, and urban and suburban space that all shows how state policies delimited individual possibilities and, also, conscripted individuals into state-produced categories for the purposes of social and legal control.<sup>5</sup>

To understand the history of American Jewish philanthropy, I contend, we must ask similar questions about the role the state played in classifying and regulating American Jews. When they created state-recognized associations, whether religious organizations or other kinds of corporate bodies with property holdings and legal standing, American Jews as a collective became visible

to and governable by state laws, bureaucracies, and agencies. Indeed, as political scientist Theda Skocpol notes, the basic tension between state control over resources and its apportionment of those resources to citizens and collective groups acting in the interest of the public has long been “literally at the heart of American public policy.”<sup>6</sup>

The few scholars who have studied the history of American Jewish philanthropy, however, have depicted it as removed from state policies or affairs. Instead, they have portrayed its development as illustrative of the broad freedom Jews had to flourish in the United States, with the full tolerance of, but little interference from, the American government. Daniel Elazar, a political scientist who in 1976 published one of the only broad studies of American Jewish philanthropy, asserted, “The American tradition is one of *public* rather than *state* institutions, with all that the semantic distinction implies.” He went on to portray American Jewish philanthropy as a product of one of the many publics fostered by “the American tradition” and, thus, as “*sui generis*” within Jewish history and “quite compatible with the evolving American culture.” Likewise, Jonathan Woocher, a sociologist and author of the most recent—though now more than three-decades-old—interpretive study of American Jewish philanthropy, explained that American Jews drew upon their philanthropic traditions “to express the meaning of Jewishness” in a way that “was thoroughly compatible with American values.” He characterized philanthropy as the core of “the American Jewish civil religion,” and argued that its practice placed Jews “firmly within the embrace of American pluralism,” while “link[ing] American Jews to the totality of the Jewish people at a level beyond ideological diversity.”<sup>7</sup>

The dual impulse to connect American Jewish philanthropy to the broad sweep of Jewish history and to claim it as evidence of a peerless, exceptional synthesis between Jews and the United States has guided the ahistorical assumptions embedded in many studies of it, even those written by historians (which Woocher and Elazar were not). Popular historical accounts tend to weave together episodes drawn from many centuries of Jewish life throughout the globe to create the impression that American Jewish philanthropy was just one expression of timeless Jewish values, often rendered through Hebrew words such as *tsedakah* (the word commonly used for charity, from the root for righteousness) and *tikkun olam* (literally “repair of the world”), now allowed to thrive freely in the United States.<sup>8</sup>

The story of American Jewish philanthropy as the survival and efflorescence of Jewish traditions on American soil obscures the massive transformations that

reordered Jewish philanthropy in the United States and implanted it firmly in the political economy of the American state. Even when it moved across national lines and flowed through global channels, American Jewish philanthropy bore the deep imprint of the American state. The American Jewish philanthropic complex was a by-product of American statecraft, making Jewish philanthropy far more than a Jewish endeavor, but rather an instrument, alongside other philanthropic bodies and putatively nonstate actors, of the state.<sup>9</sup>

As Novak and other historians tell us, the concept of the American state is a slippery one, dispersed across layers of agencies, bureaucracies, and courts at the federal, individual state, and local levels; and yet this protean profile must not deter us from studying it. By telling the history of American Jewish philanthropy as the historical formation of a complex, I reveal an often-neglected dimension of American Jewish history: its ever-shifting entanglement with the state.

Over the course of the middle to late twentieth century, a wide array of individuals, collective institutions, and state bodies became reliant on the American Jewish philanthropic complex, both for its material benefits and also for its authorization of a model of American governance that empowered private interests to define and serve the public good. Far from simply adhering to state efforts to regulate collective bodies and their property, American Jewish philanthropic entities entered into a dialogue with state institutions about the nature of regulation, protection, and freedom; that is, they participated in state-level negotiations over how best to balance the interests of capitalism with those of democracy. They worked alongside other philanthropic associations to interpret and craft American policy. Furthermore, they used their proximity to state agencies in order to advocate expanding the way that private entities could act, with state encouragement, in the name of the public good. In all of these ways, American Jewish philanthropy transformed into a complex arrangement of knowledge, institutions, and capital thoroughly embedded in the American state.

Readers will find here neither an exhaustive review of every American Jewish philanthropic organization that has existed nor a deep discussion of how American Jewish philanthropy shaped the lives of everyday American Jews. I have tried to provide references for those interested in these topics and others that I similarly treat only superficially. Indeed, I am hopeful that my work will contribute to and inspire new research that explores questions that exceed my own analysis. For example, this book only touches on the gender and sexual politics ingrained in philanthropy, but its focus on systems of authority may

suggest to others a fruitful starting point for examining those dynamics. Likewise, although this is not a comparative study, I offer a framework for thinking about the role of the American state in limning Jews' collective experiments that may enable other scholars to draw new comparisons among American Jews and other American groups and, also, among Jews in the United States and Jewish communities elsewhere. In these ways and others, I hope to contribute to a scholarly shift to reconsider the role of the American state in American Jewish history, thereby dismantling the exceptionalist foundations upon which the field has rested.<sup>10</sup>

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Chapter by chapter, I trace the development of the American Jewish philanthropic complex's core concepts—association, regulation, property, taxation, politics, finance and identity, and the market—beginning in the nineteenth century, with particular focus on the decades after World War II, and concluding in the early twenty-first century. The chapters illuminate how each of these concepts built upon the prior and supported the next. The book's structure is intended to illustrate the process of historical formation, contingency, and relationality that shaped Jewish philanthropy into a complex that, to many people's eyes, came to appear a natural feature of American Jewish life, beyond the history that created it.

The first chapter considers state-based experiments to govern a diversity of American groups or "associations" starting in the nineteenth century. Not able to adjudicate how every single group acted, individual states and then the federal government instead legislated uniform practices to tether collective associations to American law without demanding uniform beliefs. The legal framework of the association acted as a lever of power for governmental entities, allowing them to control and extract resources from groups in different ways than they acted upon individuals. In theory, so long as American Jews' collective enterprises adhered to these practices, they would be treated similarly to any other collective group. By forming associations, Jews made themselves legible to governing bodies and formed a relationship with the American state, as it emerged locally and nationally through agencies, courts, and elected officials.

The second chapter examines how increasingly centralized governing bodies enacted regulations on collective associations. In their infancy, these regulations provided only the skeletal outlines of an evolving relationship between the American state and those associations classified as acting in the interest of

the public. Often, associations filled the gaps through their own bylaws and interpretations of what different state bodies could expect from and offer to them. For American Jews, the federation system, a city-by-city effort that emerged in the early twentieth century to coordinate fund-raising for Jewish agencies, played a critical role in defining the relationship between American Jewish collective life and state-based regulatory claims. Most important, federations disciplined themselves by requiring that dollars raised through annual fund-raising campaigns be allocated fully and expeditiously to service-providing agencies.

The third chapter focuses on the changing meaning and nature of Jewish communal property, from dollars to investments to real estate. In the years of the Great Depression and its wake, federal state power grew ever more centralized, most evident through the expansion of social welfare programs and the creation of agencies and bureaucracies charged with regulating economic growth. In this environment, some Jewish leaders began to challenge the valuation of Jewish communal property through only the immediate needs it could fulfill. The Depression had depleted the shallow wells of financial reserves that Jewish organizations held, and now, with a government newly committed to providing for its citizens' social welfare, some Jewish leaders considered whether Jewish philanthropy could invest more substantially in the future by holding back immediate expenditures. Endowments—savings accounts that invest their corpus for growth and, generally, spend below their investment returns as a strategy for perpetual growth—would change the valuation and purpose of Jewish communal property.

Whether circulated immediately or reserved for the future in savings or endowment accounts, Jewish communal property reflected the American tax structure, the sustained focus of the fourth chapter. American tax policies markedly changed in the decades after World War II. In these same years, American Jewish institutions turned unprecedented time and resources to the task of understanding the policies governing philanthropic transactions. They retained tax lawyers, often members of their community, to help them interpret and apply tax codes. As they grew reliant on these tax experts, Jewish philanthropic institutions also began to define a set of tax-related interests around which to lobby agencies, bureaucrats, and elected officials. More than ever, they understood their existence as intertwined with how the American state decided to underwrite various forms of philanthropic practice.

The fifth chapter explores the political position that American Jewish philanthropic institutions and their leaders occupied as they became enmeshed in state processes and amassed capital in new ways. I describe these institutions

and their leaders as participating in “depoliticized” politics. Through tax policy, American policymakers had advanced a precise and enforceable definition of the types of political behavior that would disqualify a philanthropic organization from receiving state enrichment through a tax exemption. Narrowing political behavior to electoral campaigning and “substantial” legislative lobbying, state regulations allowed philanthropic bodies to maintain a posture of remove from political matters while acting in profoundly political ways; in other words, these regulations gave birth to depoliticized politics. Jewish philanthropic institutions and leaders used their communal standing and the capital they held to access American state leaders. In multiple ways, they worked to sway policy discussions, yet all the while operating in the name of Jewish consensus and with the cover of a tax status that categorized them as not political. Hardly unique to American Jews, the mode of depoliticized politics was open to myriad philanthropic organizations that likewise saw great benefit in seemingly standing at a distance from politically fractious ideologies while claiming to represent a consensus or set of shared interests by virtue of their standing.

Parallel to the political consolidation that tax policy enabled Jewish philanthropic institutions and leaders to achieve was a similar consolidation of finance and so-called Jewish identity, the twinned subjects of chapter 6. In the late 1960s and 1970s, Jewish philanthropic organizations gained new tools to build financial strength through endowment vehicles and, simultaneously, to render Jewish identity through the prism of financial perpetuity. Until that time, endowment-building had existed only at the margins of Jewish philanthropy, pursued quietly if at all by Jewish federations and some private Jewish foundations. Yet American Jews’ rising wealth alongside the passage of new tax legislation in 1969 helped strengthen the case for Jewish philanthropic institutions to choose capital accumulation, through endowment vehicles, over its rapid distribution. A growing communal fixation on Jewish identity and its looming crisis—precipitated in part by American Jews’ rising socioeconomic status—reinforced future-oriented financial practices, where today’s dollars could invest in and secure the next generation’s identity.

Chapter 7 explores how Jewish philanthropic institutions braided together the strands of finance, politics, and identity by the early 1980s to align with the pro-market ideals espoused during the Reagan years. Regardless of whether Jewish philanthropic leaders personally supported the new administration, they participated in a structure that endorsed its central terms of a small state with a large private market, unfettered by regulation yet nurtured by incredibly significant and favorable tax policies. Furthermore, more than simple

observers of the political scene, Jewish philanthropic leaders believed their position provided them with a platform to influence state policy, especially related to Israel. In the name of asserting and preserving a consensus-based Jewish identity, they leveraged the financial and political consolidation they had achieved and entered the American political scene as Jewish spokespeople more visibly than ever before.

Herein, the American Jewish philanthropic complex emerged in full force. Chapter 8 draws attention to how the complex affirmed and enacted the structure of late-twentieth-century American political economy, in its inequality and its support of private forms of power over public goods and processes. Before any philanthropic dollars were even distributed to serve public interests, philanthropic funds grew and accumulated as if they were any other capital investment. But, unlike most other forms of private capital, one of their biggest investors was the American state. Treating a portion of its tax revenue as public venture capital, the American government invested public dollars in these private entities, on the promissory note that they would expend their gains for the good of the public. At least in the short term, this practice had the consequence of hardening the lines of inequality that a more redistributive logic of philanthropy had once gestured toward remedying. The American Jewish philanthropic complex, like American philanthropy more generally and like the American state, had entrusted democracy to capitalism, a far cry from efforts to balance the two.

On the eve of the new millennium, the American Jewish philanthropic complex mirrored the structure of America itself, in its wildly uneven distribution of capital and its dependence on a very few and empowered private entities. The only way the isomorphism between American Jewish philanthropy and American political economy would be surprising was if one disregarded the structuring power of the American state across well over a century's formation of American Jewish philanthropy. By the same token, the only way one could conclude that this arrangement of American Jewish philanthropy was timeless, inevitable, or uniquely Jewish was by neglecting the massive historical transformations, chronicled in this book, that made way for the formation of the American Jewish philanthropic complex.

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Just as some of the individuals in this book were anxious about putting Jewish wealth on display or making Jewish communal finances too visible, I have also

worried about the consequences of writing a book that traces the growth of American Jewish philanthropy and its alignment with American capitalism. For almost a century, a long shadow cast by nineteenth- and early-twentieth-century antisemitic writing about Jewish economic behavior has warded off precisely the sort of study of Jewish politics and economics I have undertaken. Letting fears about antisemitism guide them away from the topic, many historians may have believed that to write about Jews' economic lives was to play into antisemites' hands. They likely did not think their histories would actually validate antisemitic claims, but they worried about drawing upon a shared vocabulary and, more so, having to concede that certain patterns, tied to antisemitic tropes, were common among Jewish historical actors in specific circumstances.<sup>11</sup>

In recent years, alongside rising interest in the history of capitalism, a growing number of Jewish historians have made a strong case for why the field must nevertheless study Jewish political economy. As historian Derek Penslar argues, “[R]eflection about the economic structure, behavior, and utility of the Jews within the framework of the society in which the Jews lived” has “profoundly affected the course of modern Jewish history.” Thus, the topic cannot be ignored or dominated by “apologists, ideologues, and anti-Semites,” in the words of intellectual historian Adam Sutcliffe. The defenses that these historians and others have mounted have begun to turn the scholarly tide that for so long pushed against examining Jewish economic behavior; however, their legitimation does not release me from the obligation to explain my approach and evidence as plainly as possible.<sup>12</sup>

I have persistently (and obsessively) asked myself what responsibility I bear when treading the same ground that has provided fodder for antisemitic theories of Jewish power or domination. When I started to study American Jewish philanthropy, I occasionally described my research as focusing on “Jewish power.” I no longer find that characterization accurate or interpretively honest. Far from a study of Jewish power, this is a book about how individuals and institutions accessed and exercised power at different moments in time. At points, those actors gained power—through law, property, capital, political sway, expertise, or networks—and, at times, they were in close relationship to sources of power, especially state-based laws and policies. This interpretive lens, focused on relationality and proximity, is quite apart from one that would attempt to name or reify something called Jewish power.

An individual may want to invoke Jewish power as a political or identity claim, but the standards for using the term as a historical framework are

different. The historian would have to explain how, precisely, the noun (power) is modified by the adjective (Jewish), when the parts and the whole are constantly changing. I have not pursued that task here because I do not find it instructive for my historical project. To the contrary, I think the term “Jewish power” would compromise my analysis, drawing attention away from the specific relations and contingencies of power to a stable and putatively Jewish mode.<sup>13</sup>

I have attempted to write about power in the most specific and historically informed way possible because I believe doing otherwise is irresponsible and, frankly, dangerous. Decidedly not an institutional or social history, this book is, instead, about the constituent parts that resolved into a complex of American Jewish philanthropy. It calls upon historical sources, from meeting minutes to congressional testimony to tax law and the Internal Revenue Code to personal papers and recollections, in order to illuminate the formation of that complex.

At the end of the day, I have limited control over how others perceive or use my words. My historical subjects could not possibly avert antisemitic perceptions about Jews and finance, and I will not hold out false hope of eradicating antisemitism through reason or history. My aim, however, is to make it impossible—or, at least, an act of willed blindness—to confuse a diffuse category of people with a turgid and fraught abstraction about the totality of their power. The history of American Jewish philanthropy belies the existence of a singular Jewish power, revealing, instead, a complex. Only in teasing apart the tangled webs of interaction among state policies, collective associations, financial transactions, political acts, and ever-shifting sources of norms and authorities within Jewish communities can we begin to understand the broad significance of philanthropy to the history of American Jews and the history of the United States.

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