



meet your neighbors
Portrait Photography by Armando Colls

B Jayusia & Alan
Bernstein



How infinitesimal do you think the probabilities are for a nice Jewish boy from Washington, D.C., meeting and marrying a knock-out Jewish girl in Lima Peru, and then ending up making their home in Cocoplum? Their story is one for the books, hence this beautiful feature on two individuals who are unequivocally devoted to one another on all levels of life.

Meeting in 1967 in Lima, Peru

Alan’s first job out of Harvard Business School was with a “private equity” firm (we did not know the term then) based in Lima funded by U.S., European, and Japanese capital. This was the period of the 1967 War — “while I was trying to connect with the Jewish community, Jayusia made a point of connecting with me.”

“Jayusia called me at my Lima office to invite me to a local social gathering to meet a new rabbi. In Lima, everyone knew who she was as her uncle in those days was one of the most important bankers in Peru. Alan was clueless. But he exclaimed that “when we did meet at the function — my attention was one hundred per cent on Jayusia, not the rabbi.” It still is!

From August 1967 when we were introduced until the end of the year, I was away from Lima on business more than half the time. We dated “intensively” but did not get engaged...yet. I returned to the United States on January 1, 1968, to start a career as an institutional oil analyst with a major Wall Street firm at that time, Loeb Rhoades.

Alan was in New York, Jayusia in Lima. Not easy for young people in love to communicate internationally in those days. A letter from New York to Lima took at least two weeks. A telephone call

was a capital investment. “One time, Jayusia called me by ham radio — it was a riot: “teléfono malogrado!”

In the spring, Jayusia was awarded a full scholarship by the U.S. Government to attend Colorado College in Boulder Springs. Since New York was clearly on the way (well not exactly), she came for a brief visit. Of course, Jayusia never left New York. They were married in a small civil ceremony that fall at Alan’s home in Washington, D.C., and later in a much larger religious wedding in Lima.

New York and Early Careers

Shortly after arriving in New York as newlyweds, Jayusia stated she was returning to school. Normally the process requires filling out an application, taking the college boards, maybe even an interview, and waiting anxiously for a decision. Not Jayusia. She went directly to the Admission Office of NYU, filled out the forms, talked to one of the assistant deans, and was accepted on the spot. “I have no idea what she said — can only imagine!” She graduated Phi Beta Kappa. And two years after that, NYU awarded her an MBA in investment finance. Jayusia ended up in the investment advisory department of Kidder Peabody, another leading investment firm at the time, where a senior colleague offered investment advisory services emphasizing covered option writing to reduce portfolio risk and to enhance returns. Little did we know that her expertise in investment management would be critical to our second career.

Yin and Yang^[1]

Fast forward. Alan went from being an oil analyst to joining a publicly held independent exploration company and then to starting up his own petroleum drilling and production company in the



late 1970s, largely at the encouragement and financial support of Jayusia. When it became evident that the new company would survive, she resigned her position on Wall Street and joined him. In this phase, Alan is the managing partner. Though their company flourishes, by the latter 1980s, the U.S. petroleum industry is floundering. So, in the early 1990s, Jayusia took the lead in founding Stratigraphic Asset Management, an SEC-registered investment advisory firm. This time she is the managing partner. “Jayusia manages the portfolios and I do the macro-economic and company analyses on which we base our decisions. We do it all, together. We understand one another [almost] perfectly.”

At the question of what we to do for “excitement” Jayusia candidly muses, “Life cannot always be easy when you are with the same person all day long – even in love, excitement can become a challenge!” Stratigraphic Asset Management, a small boutique money management firm catering mostly to friends and family has done well for all involved. However, when we think about it – it is our family that truly is most important. Our two sons and four grandkids are our real pride and joy. Sons Leo and Marc have become highly successful.” Leo, who attended the University of Chicago Business school, has two sons and is an entrepreneur. Marc, an NYU graduate, works for Credit Suisse as a Managing Director in Investment Banking. To Alan and Jayusia’s good fortune, Marc currently resides in Cocoplum with his wife and two daughters.

“We Love Cocoplum!”

When we transitioned out of the oil business into the investment management business, we decided to leave Texas for Miami,

which was closer to Latin America, family, and friends. “We have now lived in Cocoplum for more than 20 years,” Jayusia shares. “Choosing Cocoplum was easy; it was perfect for us.” Once a broker showed a home in Cocoplum, Jayusia knew it was where they belonged. They ended up buying a lot on the water and together building their dream home. “We love it – well, what is there not to love,” they boast. “It is a fantastic location, close to downtown, close to our office in the Gables, and close to the rich cultural life that thrives in our area — there is nothing that is not to love.” Moreover, they have come to meet many exceptional people over the years who give selflessly to the Cocoplum community like Ana Milton, Paolo Amore, Hector Fortun, among many others.

Giving Back

“We have come a long way from our roots”, remarks Alan. “My grandfather immigrated through Ellis Island from Jerusalem in 1900 and Jayusia is a child of the Holocaust, meaning her Romanian parents went through WWII in concentration camps. When you have been so blessed, it is important to give back.”

Over the years, Alan and Jayusia have served on boards of performing arts groups, Jewish organizations, and educational institutions. Alan was on the Board of Trustees of Amherst College, his alma mater, and Jayusia was on an Advisory Board of NYU, her alma mater, and both were on the Board of Directors of the Spanish Repertory Theater in New York. In Miami, Alan was a board member at Ransom Everglades School, which Marc attended, and at Temple Beth Am. Their special interest has been classical music. Alan served on the board of the Florida Philharmonic, the Arsht Performing Arts Center Trust, and the

Musical Arts Association of Miami, which established the Cleveland Orchestra Miami Residency.

There is one local organization that in the eyes of Alan and Jayusia has been truly exceptional, the Miami Music Project, which combines their interest in classical music and their commitment to education, and is distinguished by its measurable impact in the Miami community.

The Miami Music Project was founded by Maestro James Judd who was the musical director and conductor of the Florida Philharmonic for many years. Judd had a vision, which was for kids in our public schools to have more access to classical music and music education. What began originally as an organization bringing classical musical performances

by professional artists into public schools to expose students metamorphosed into a free afterschool program dedicated to bringing social transformation to under-resourced communities through teaching children classical music and at the same time crucial skills needed for success in life.

According to Anna Klimala, the President of the Miami Music Project, “We adopted a program model from Venezuela, El Sistema, which focuses on working with children from underserved socio-economic communities. As set forth in the Miami Music

Project’s mission statement, our organization ‘uses music as an instrument for social transformation, empowering children to acquire values and achieve their full potential, positively affecting their society through the study and performance of music.’”

The impact of the Miami Music Project was evaluated in an exhaustive longitudinal study by FIU researchers. The data confirmed that the Miami Music Project students have higher grades in school, better conduct, have less challenges at home, and develop high-level skills faster than their peers who are not in the program. As the students attend classes for generally two hours in the afternoon five days a week, parents are tremendously supportive of their children and the program.

Pre-pandemic, the Miami Music Project was serving close to 750 students through all of their educational programs. The students are taught by more than 60 professional Teaching Artists in five community chapters in Liberty City, Little Haiti, Little Havana, Miami Gardens, and Miami Springs. There are plans to open a new chapter soon on Miami Beach. Additional programs include intensive Orchestra Boot Camps over weekends and a Summer Music Camp.

Anna Klimala proudly shares that “all of our students who stayed with the program through high school graduation are now in college, some are pursuing a Ph.D. She noted, however, that, “the goal is not to produce professional musicians, but to provide our students with the tools to succeed in life.”

For more information, or to donate, please visit www.miamimusicproject.org

[1] In Ancient Chinese philosophy, yin and yang is a concept of dualism, describing how seemingly opposite or contrary forces may actually be complementary, interconnected, and interdependent in the natural world, and how they may give rise to each other as they interrelate to one another. Wikipedia