United Jewish Endowment Fund

Agency Investment Fund

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The United Jewish Endowment Fund (UJEF) can help improve your organization's investment diversification and quality by pooling your assets with those of other donors, endowments, agencies, organizations and congregations.

At A Glance

- Partner agencies of The Jewish Federation of Greater Washington and other local Jewish organizations and congregations may establish investment Funds with UJEF.
- Agencies gain access to investment opportunities available only to larger investors.
- Agencies retain ownership of their assets.

Why Invest with UJEF?

- Organizations with limited assets may be unable to access certain investment options that they would prefer to use to achieve investment diversity and steady returns.
- UJEF can help. We enable congregations and Jewish agencies to pool their invested assets with those of other UJEF funds. Together, all participants gain access to fund managers requiring larger investments than accessible by any one congregation or agency.
- UJEF has an Investment Committee and a professional investment consulting firm that actively guide the pooled investment fund.
- The funds invested are easily accessible within 10 business days. Withdrawals of at least $100 each can be made once per month.

Who will own the Fund?

- Each organization continues to own the funds invested in the pool.
- Each organization will get monthly statements reflecting starting and ending balances, additions, distributions, and realized and unrealized gains and losses.

How are funds Invested?

- UJEF Investment Committee, with the help of its expert investment advisors, evaluates, selects and monitors the performance of each fund manager and the entire portfolio.
- The UJEF Investment Policies are available upon request.

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What else does your organization need to know?

- The value of assets in an Agency Investment Fund is subject to fluctuations in the stock market and interest rates.
- Investing Agencies should consult with their own advisers regarding the risks, tax treatment and other aspects of investing with an Agency Investment Fund at the UJEF.
- Your organization may withdraw its funds, with notice, if you decide that your assets would be better invested elsewhere.
- Details of the UJEF investment performance history, a copy of an Agency Fund Agreement, and a schedule of subsidized nominal fees are available on request.

The United Jewish Endowment Fund of the Jewish Federation of Greater Washington strives to help our community provide an enriched Jewish life today and a vibrant Jewish tomorrow. The Endowment Fund connects philanthropists with opportunities to meet Jewish needs and *tikkun olam*—repairing the world. Together, we strengthen and advance Jewish life in the Greater Washington area and around the world.

The United Jewish Endowment Fund of The Jewish Federation of Greater Washington

- Generates permanent funds to support the work of our Jewish Federation family of agencies and beyond to the Greater Washington community;
- Catalyzes diverse funding sources to leverage our ability to meet Jewish needs and effect change in the broader community;
- Awards seed money to new and innovative initiatives for enriching Jewish life and for tikkun olam; and
- Furnishes funds for unanticipated and emergency needs locally and overseas.

The United Jewish Endowment Fund's Legacy Society recognizes those individuals who create a permanent fund of at least $10,000 to sustain the vitality and strength of our Jewish community. If you establish a fund of $200,000 or more, you will become a member of the national Star of David Society of the Jewish Federations of North America.

Contributions to the United Jewish Endowment Fund are tax deductible to the full extent the law allows.

This material is not intended to provide professional or legal advice. Please consult your advisors for professional advice.

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The Jewish Federation
OF GREATER WASHINGTON