

Good Deeds Day Success

United Jewish Endowment Fund Trustees joined over 1500 community volunteers on March 25th for Good Deeds Day. Volunteers actively participated in projects at 60 local sites. Below is a sample of the impact we had in the Greater Washington community:

- 200 bag breakfasts and 500 bag lunches were made for local homeless shelters
- 500 nutritious snack packs prepared for the homeless
- 100 grocery bags for homebound low-income seniors
- 90 Passover baskets for those in need
- Thousands of pounds of food collected
- Other projects included creating bracelets for hospital children, dog treats for shelter dogs, and activities with seniors at the Hebrew Home.

The United Jewish Endowment Fund supports food and nutrition programs year round through a grant to the Washington DC Jewish Community Center's Behrend-Adas Senior Fellowship Program. The program serves 40-90 seniors in Northwest DC on a daily basis through a kosher lunch program, socialization activities, field trips and the participation of a weekly Jewish Social Service Agency social worker.

FOR MORE INFORMATION, PLEASE CONTACT:

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Volunteers gather to make blankets for hospital patients and the homeless at the Jewish Community Center of Northern Virginia.



Good Deeds Day DC Chair, Sophie Schlosser, makes sandwiches to be included in food bags being handed out in Franklin Square to anyone in need.



Students and volunteers at Gesher Jewish Day School decorate bags that will be used for Passover food packages given to those unable to afford a holiday meal.

YOUR STATEMENT

2012

Making a Statement

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GIFTS TO OUR COMMUNITY:
GOOD DEEDS DAY 2012

Message from the President and Managing Director

Enclosed you will find your quarterly statement for your United Jewish Endowment Fund (UJEF) fund. Please note that your quarterly statement reflects contributions and distribution activity as well as investment performance through March 31, 2012.

Spring is in the air, which means that you have many upcoming events to participate in; check them out on page 3. As we mentioned last quarter, we will be implementing some new and exciting tools and programs based on the feedback we received from our customer satisfaction survey. We are excited to announce that we will be launching a new fundholder website shortly. We will send you a separate email or letter with instructions on how to logon and request a password. Keep an eye out for that notice. Also, as part of our ongoing effort to help make the most of your experience, we would like to confirm your preferred method of communication. Please visit shalomdc.org/ujefcontact or contact Marla Hurwitz at 301-348-7357, so we can connect with you in the way that you choose.

As always, we hope that you will contact us with any questions that you may have at 301-230-7230 or endowment@shalomdc.org.

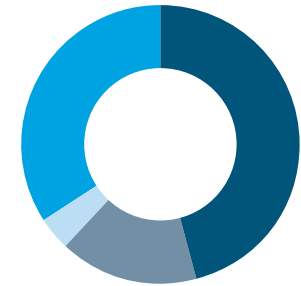
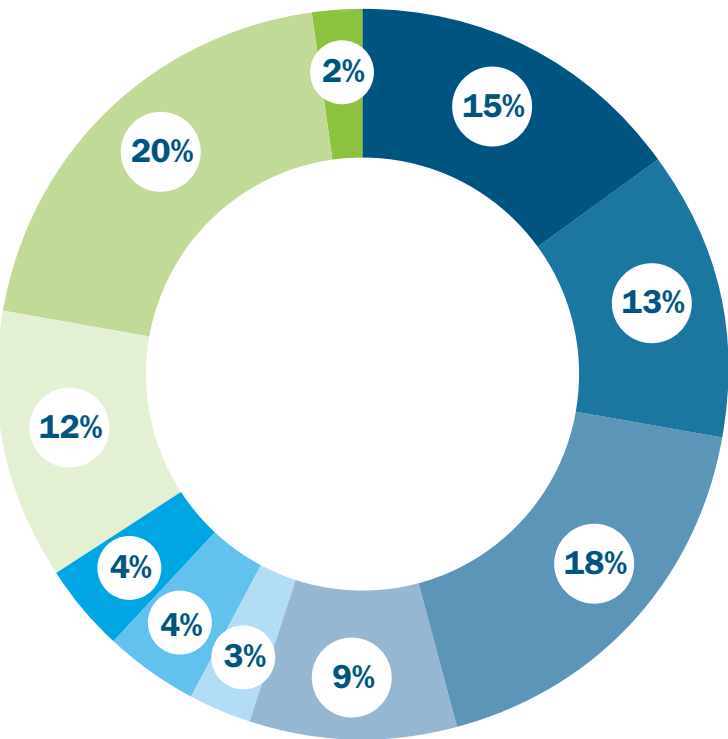
Best Regards,

Ronald A. Paul, M.D.
President

Eileen Frazier
Managing Director



Portfolio Allocation March 2012



Purpose of Investments in the Portfolio for March 2012

- 46% Stock Market Exposure
- 16% Return Enhancing
- 4% Inflation Oriented
- 34% Diversifiers



Liquidity Summary March 2012

- 41% Daily
- 15% Monthly
- 10% Quarterly
- 11% Annually
- 23% Illiquid

Equity 66%

- 15% Domestic Stocks
- 13% International Stocks
- 18% Long/Short and Event Driven
- 9% Private Equity
- 3% Private Real Estate
- 4% Public Natural Resources
- 4% Private Natural Resources

Fixed Income 34%

- 12% Credit Oriented Hedge
- 20% Fixed Income and Cash
- 2% Israel Bonds

| INVESTMENT PERFORMANCE THROUGH MARCH 2012 | | | | | | |
|---|---------------|---------|----------------|--------------|--------------|---------------|
| | Current Month | Quarter | Last 12 Months | Last 3 Years | Last 5 Years | Last 10 Years |
| Entire Fund Total | 0.19% | 6.70% | -0.33% | 12.66% | 1.13% | 4.40% |
| Policy Index | 0.15% | 7.70% | 1.07% | 12.82% | 1.24% | 4.58% |
| S&P 500 | 3.29% | 12.59% | 8.54% | 23.42% | 2.01% | 4.12% |

Please note that these numbers include estimates and are subject to revision. Performance reports are based on the most current data available.



The first year of training has just concluded with the fourth session of a seven-part training institute. On April 25, CJL partner agency professionals and lay leadership gathered at the JCC of Greater Washington to learn more about

stewardship and recognition of legacy givers. The program is the first of its kind in the community, routinely bringing together over 70 community members, including senior professional and lay leadership from 17 social service agencies, synagogues and Jewish day schools.

After a summer hiatus, the second year of this training institute will begin again in the fall. CJL will continue to bring in nationally recognized consultants to discuss planned giving programming, community building, multi-generational issues and how to begin conversations about what has been meaningful about our Jewish experiences.

UJEF is opening registration for the second cohort group which will begin training in January. If you are interested in learning more about how your agency, synagogue or day school can get involved, please contact Jennifer Scher at 703-286-1039 or email jennifer.scher@shalomdc.org.

Creating your Jewish legacy is the first step toward being our partners in building a foundation for Jewish life for generations to come. Join us.

UPCOMING EVENTS

Mitzvah Mavens • May 20, 2012

Women from our community will work with the Washington DCJCC's Behrend Builders to help refurbish a homeless shelter in DC.

shalomdc.org/mitzvahmavens

Israel@64 • June 3, 2012

Celebrate Israel's 64th birthday at the biggest community event of the year!

shalomdc.org/israel64

Annual Meeting • June 11, 2012

This year's Annual Meeting will feature remarks by Dr. Michael Oren, Ambassador of Israel to the United States as well as the introduction of 10 innovative projects developed by the 2012 ConnectGens Fellows. Following the meeting, join us for a dessert reception where you will have the opportunity to talk one-on-one with the fellows to learn more about their exciting concepts.

shalomdc.org/annualmeeting

Giving Tip

Are you seeking a guaranteed level of income and a way to have a charitable impact? Consider a Charitable Gift Annuity.

A Charitable Gift Annuity (CGA) offers both financial and philanthropic benefits. You are guaranteed to receive a specific annual payment, a portion of which may be free of income tax. Additionally, you may receive a current charitable income tax deduction or a reduction in your taxable estate. If you choose to use appreciated assets to fund a gift annuity, no capital gains taxes are due when the securities are contributed. Instead, a portion of your income from the annuity will be subject to capital gains tax, which will be paid over your life expectancy.

And, when the annuity concludes, the balance of your gift can create a permanent fund with enduring benefits to the Jewish community. You can establish a CGA with a contribution of \$10,000 or more. A gift can be in cash, securities, and certain other property subject to approval. CGA donors are recognized as members of the Legacy Society.

The United Jewish Endowment Fund can help you achieve your philanthropic goals. Legacy gifts may be created through a life income gift, such as a Charitable Gift Annuity or Charitable Trust or other gift planning vehicle. For more information, please contact Jennifer Young at 301-230-7235 or jennifer.young@shalomdc.org.

Consult with your legal or tax advisor to find out how the topics discussed in this article might affect your individual financial situation.