

## Five Tips for Engaging Your Children (or Grandchildren) in Philanthropy

### Help Children Observe

Point out, for example, vans that transport people who cannot drive or puppet shows that are supported by donations. Let your children watch you make donations, keep granola bars in your car to give to homeless people or let them see you volunteering. Sharing what you do to help others will help children picture themselves giving and helping.

### Discuss Philanthropy

Discuss with your children which causes you support and why, and help your children think about issues they care about. Ask thoughtful questions: If you could solve any problem, what would it be? If you had a million dollars to spend on fixing the world, how would you spend it? Why do you think it's important to give to charity?

### Don't Dismiss the Hard Issues

Children think about complex issues whether you bring the topics up or not. They hear news reports, listen to you and their peers talk about money and see homeless people on the streets. Listen for issues behind their questions and give them opportunities to process their thoughts.

### Help Children Participate in Giving

Let your kids direct some of your family's charitable giving. If appropriate, your child can give in his or her own name and get the pleasure of receiving the thank you from the charity. Consider setting up a system for allocating a share of your child's allowance or gifts to charity. Help your children tap their natural generosity and connect to the emotional rewards of giving back.

### Create Charitable Traditions

Rituals become embedded in our lives more than any lecture or lesson. Find an expression of giving that brings joy to your family and make that activity a recurring tradition. Ideas include:

- A family volunteer day
- An annual visit to a hospital or shelter
- Giving your child money to buy a toy or book to give
- Holding an annual meeting to plan the family philanthropy
- Picking an old toy to donate each time your child receives a new one

### FOR MORE INFORMATION, PLEASE CONTACT:

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JOIN US FOR AN  
EXCLUSIVE AND  
INSPIRATIONAL  
EVENING



If you are a Lion of Judah or have a Lion of Judah Endowment, you are invited to join us for an intimate evening of conversation with French Ambassador François Delattre

**TUESDAY • MAY 20, 2014**  
**6:30 p.m.**  
at the Residence of the  
French Ambassador

*Space is limited and  
registration is required*



If you are interested in attending, please contact Mandy Kaiser-Blueth, Director of Women's Philanthropy, at 301-348-7349



The Jewish Federation  
OF GREATER WASHINGTON

Women's Philanthropy

## YOUR STATEMENT

SPRING 2014

# Making a Statement

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## Message from the President and Managing Director

Thank you for your commitment to the United Jewish Endowment Fund (UJEF). This issue of Making a Statement includes the Endowment Fund's performance for the quarter ending March 31, 2014.

On March 27, UJEF hosted a special reception for Allied Professionals before The Network Event and welcomed more than 40 attorneys, accountants, life insurance agents, financial planners and investment advisors. UJEF works with these Allied Professionals to help them help their clients achieve their philanthropic goals. By working with the United Jewish Endowment Fund, these professionals can affect the future of the Jewish people. Please email [endowment@shalomdc.org](mailto:endowment@shalomdc.org) or call 301-348-7357 if you are interested in learning more, playing a part in shaping the future of the group or if you would like to suggest an Allied Professional who should be invited to future events.

Good Deeds Day, on April 6, attracted an amazing 6,500 participants, including 40 congregations, 80 service sites and 38 public projects. Thousands of people working together accomplished an immense amount of work, making our entire community stronger. Thank you to everyone who participated!

We would like to congratulate Paul Berger, the recipient of this year's Jewish Federations of North America's Endowment Achievement Award. This award honors a member of our community who, through leadership, vision and dedication, has been instrumental to the successful growth of our Federation and Endowment Fund. Paul Berger does that and more. He has served as a mentor and advisor to many presidents of Federation and UJEF, all of whom treasure the wise counsel, broad community knowledge and friendship he provides. He is a role model who practices what he preaches, who is an avid Jewish learner and an ardent Zionist. Congratulations and thank you, Paul.

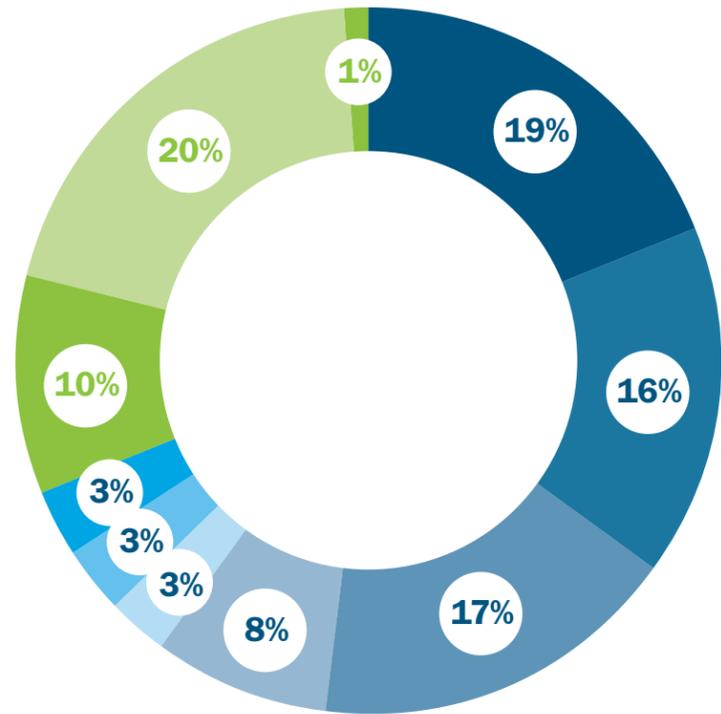
As always, we hope that you will contact us with any questions that you may have at 301-230-7230 or [endowment@shalomdc.org](mailto:endowment@shalomdc.org).

Best Regards,

Mark Levitt, President

Eileen Frazier, Managing Director

## Portfolio Allocation March 2014



### Equity 69%

- 19% Domestic Stocks
- 16% International Stocks
- 17% Long/Short and Event Driven
- 8% Private Equity
- 3% Private Real Estate
- 3% Public Natural Resources
- 3% Private Natural Resources

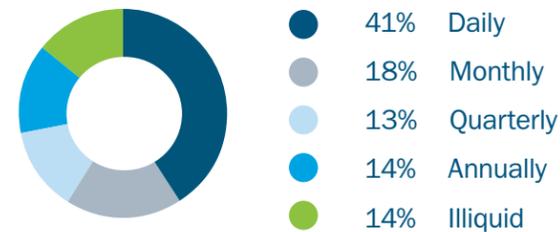
### Fixed Income 31%

- 10% Credit Oriented Hedge
- 20% Fixed Income and Cash
- 1% Israel Bonds

### Purpose of Investments in the Portfolio for March 2014



### Liquidity Summary March 2014



### INVESTMENT PERFORMANCE THROUGH MARCH 2014

	Current Month	Current Quarter	Last 12 Months	Last 3 Years	Last 5 Years	Last 10 Years
<b>Entire Fund Total</b>	<b>-0.83%</b>	<b>0.91%</b>	<b>10.49%</b>	<b>6.04%</b>	<b>11.34%</b>	<b>6.01%</b>
Policy Index	0.21%	1.25%	10.07%	6.35%	12.50%	5.58%

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

*Our community mourns the loss of*



### Phyllis G. Margolius (z"l), Past President of the United Jewish Endowment Fund and The Jewish Federation of Greater Washington

Phyllis was an extraordinary role model. She freely shared her wit, her creativity and her feedback so that we as a community could always learn and improve. As an active leader, Phyllis made volunteering both productive and fun. She used humor to diffuse tension and understood how to get us focused and intentional about what we do. She moved us forward—both as volunteers and professionals—through her affection and friendship.

We extend our heartfelt condolences to her devoted husband Phillip Margolius; loving children David Margolius, Kenny Margolius and Jennifer Margolius Fisher; and adoring brother Michael Goldman. Phyllis gave our Jewish community her all: her heart, her soul and her passion. We miss her deeply. As the “Woman of Valor” praises from the Book of Proverbs tell us—“Her lamp never went out.” Phyllis’ light will always stay with us.

*Our community mourns the loss of*



### Herman Taube (z"l), Friend and Community Leader

We remember Herman as a dear friend, former Federation staff member, prolific poet and one of our community’s best known witnesses to the Holocaust and its aftermath. Herman had the remarkable ability to channel deeply sad memories into a love of all humanity, especially the Jewish people and the State of Israel. He was a master of the written word—both Yiddish and English—and the author of more than 20 books. Herman treasured people and nurtured relationships. He was an outstanding fundraiser, determined and tireless, including this past February, when he made fundraising calls with so many of us at Super Sunday.

We extend our heartfelt condolences to his devoted wife, Susan Taube, and loving children Mark Tracy, Miriam Wajcfeld, Bernard Taube, Myron Taube and Judy Hines.

### Directed Giving Spotlight

As we reflect on the life of Herman Taube (z"l), we are reminded of the importance of supporting Holocaust survivors.

In our community, more than 200 Holocaust survivors live in poverty. The Jewish Social Service Agency (JSSA) has a waiting list of survivors who need help.

UJEF, The Jewish Federation of Greater Washington and JSSA have joined to create the Holocaust Survivors’ Community Fund. The Fund aims to ensure that our neighbors who survived the Holocaust are able to live their lives with dignity and hope. To date, we have raised \$2.1 million toward our goal of \$5 million, which is the total we need to serve this group.

The funds go a long way toward restoring previous cuts to very basic safety net services like bathing assistance, light housekeeping, delivery of Kosher Meals-on-Wheels and escorted transportation to medical appointments.

If you are interested in learning more or becoming a funding partner through your donor advised fund or through a directed gift, contact Avital Ingber, Chief Development Officer, at [avital.ingber@shalomdc.org](mailto:avital.ingber@shalomdc.org) or 301-230-7352.