



Washington, DC

## Check out What's Cookin' at the new Jewish Food Experience

Local "foodies"—chefs, restaurateurs, wine experts and cookbook authors, among others—have begun to share exciting news, recipes and stories at [jewishfoodexperience.com](http://jewishfoodexperience.com). The site has a uniquely local focus while presenting Jewish food with modern twists, international flavors and

connections to holidays and occasions. The lively local Jewish food scene, volunteer efforts to fight hunger, food-related events and, of course, delicious recipes that include organic, vegetarian, gluten-free and other dietary needs, have all found a home on [jewishfoodexperience.com](http://jewishfoodexperience.com).

Our readers share recipes, food-related stories and more online, while offline events offer ways to connect through programs such as tastings, demonstrations and an embassy series featuring discussion and tastings of Jewish food from around the world.

Join us for the most exciting thing in Jewish food since the invention of the challah at [jewishfoodexperience.com](http://jewishfoodexperience.com).

### FOR MORE INFORMATION, PLEASE CONTACT:

**Eileen Frazier**  
Managing Director, United Jewish Endowment Fund of The Jewish Federation of Greater Washington  
[eileen.frazier@shalomdc.org](mailto:eileen.frazier@shalomdc.org)  
301-230-7250

**Jennifer Young**  
Director of Planned Giving  
[jennifer.young@shalomdc.org](mailto:jennifer.young@shalomdc.org)  
301-230-7235

**Elizabeth R. Goldstein, Esq.**  
Deputy Director  
Philanthropic Giving  
[elizabeth.goldstein@shalomdc.org](mailto:elizabeth.goldstein@shalomdc.org)  
301-230-7228

6101 Montrose Road  
Rockville, MD 20852-4816  
PHONE 301-230-7250  
FAX 301-230-7270  
TTY 301-230-7260  
EMAIL [endowment@shalomdc.org](mailto:endowment@shalomdc.org)  
WEB [www.shalomdc.org/endowment](http://www.shalomdc.org/endowment)

**Jennifer Scher**  
Senior Philanthropic Officer  
Create a Jewish Legacy  
[jennifer.scher@shalomdc.org](mailto:jennifer.scher@shalomdc.org)  
703-286-1039

### UPCOMING EVENTS

#### Mitzvah Mavens Sunday, February 10

At our next Mitzvah Mavens social action project, we will help Israeli youngsters who participate in the Jewish Agency for Israel's Youth Futures program in Afula, supported by The Jewish Federation's annual campaign. Join us as we decorate items to brighten the bedrooms for youngsters who have very little to call their own. Learn more at [shalomdc.org/mitzvahmavens](http://shalomdc.org/mitzvahmavens).

#### The Network Event Thursday, February 28

After being born with a life-threatening heart condition, Alison Levine, West Point Professor and former Wall Street business woman, overcame incredible odds to climb the highest peaks on all seven continents. The lessons she learned of teamwork, tenacity and overcoming challenges helped her succeed in the business world. Join us to hear her story of hardship and triumph while networking with some of the area's top business leaders. For more information, visit [shalomdc.org/thenetwork2013](http://shalomdc.org/thenetwork2013).

#### Good Deeds Day Sunday, March 10

Roll up your sleeves and make an impact by joining hundreds of thousands of volunteers from across the globe on this community day of service. Choose a project at [GoodDeedsDayGW.org](http://GoodDeedsDayGW.org).

### YOUR STATEMENT

# Making a Statement

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## Message from the President and Managing Director

Enclosed you will find your quarterly statements for your fund with the United Jewish Endowment Fund (UJEF). Please note that your quarterly statements reflect contributions and distribution activity as well as investment performance for the September 30, 2012 and December 31, 2012 quarters.

We would like to extend a hearty Mazel Tov to Dede Feinberg on receiving the United Jewish Endowment Fund's 2012 Endowment Achievement Award from The Jewish Federations of North America. Dede's extensive involvement in the Jewish community is extraordinary, and her passion inspires and connects Jews worldwide. Among her many roles, she serves as a vice chair of the Board of Trustees of The Jewish Federations of North America. Dede also currently chairs the UJEF Grants Committee and is a member of The Jewish Federation of Greater Washington's Board of Directors. Please join us in congratulating Dede Feinberg!

UJEF has re-launched an upgraded donor fund website that is easier to navigate and allows donors to review their transactions and statements online. If you haven't logged on to Donor Web and would like to receive your username and password, please contact Marla Hurwitz at 301-348-7357 or [marla.hurwitz@shalomdc.org](mailto:marla.hurwitz@shalomdc.org).

We are thrilled to announce that we are providing a new benefit to Endowment Fund holders. As a fund holder, you can stay up-to-date with charitable giving news by signing up for our new weekly eNewsletter. If we have an email address associated with your fund, you should have already received an email explaining how we are facilitating your enrollment. If you haven't yet enrolled, you can enroll by going to [shalomdc.org/endowment](http://shalomdc.org/endowment) and clicking on the eNewsletters link on the right side of the web page. If you are in the financial, estate or tax planning fields, you may also want to sign up for our Advisor eNewsletter which you can do by clicking on "For Advisors" on the Endowment page.

Be sure to read about the Jewish Food Experience, a program funded by UJEF, on page 4. 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).

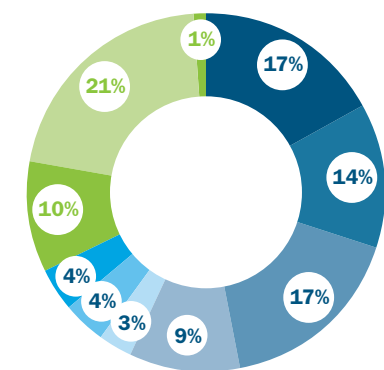
Best Regards,

Ronald A. Paul, M.D.  
President

Eileen Frazier,  
Managing Director



## Portfolio Allocation December 2012



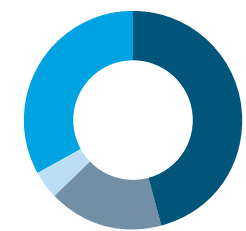
### Equity 68%

- 17% Domestic Stocks
- 14% International Stocks
- 17% Long/Short and Event Driven
- 9% Private Equity
- 3% Private Real Estate
- 4% Public Natural Resources
- 4% Private Natural Resources

### Fixed Income 32%

- 10% Credit Oriented Hedge
- 21% Fixed Income and Cash
- 1% Israel Bonds

### Purpose of Investments in the Portfolio for December 2012



- 48% Stock Market Exposure
- 16% Return Enhancing
- 4% Inflation Oriented
- 32% Risk Mitigation/Diversifiers

### Liquidity Summary December 2012



- 41% Daily
- 16% Monthly
- 13% Quarterly
- 7% Annually
- 23% Illiquid

### INVESTMENT PERFORMANCE THROUGH SEPTEMBER 2012\*

	Current Month	Current Quarter	Year to Date	Last 12 Months	Last 3 Years	Last 5 Years	Last 10 Years
<b>Entire Fund Total</b>	<b>1.57%</b>	<b>3.39%</b>	<b>7.38%</b>	<b>9.86%</b>	<b>7.48%</b>	<b>0.58%</b>	<b>6.90%</b>
Policy Index	2.02%	4.98%	9.21%	14.14%	5.96%	0.13%	6.53%
S&P 500	2.58%	6.35%	16.44%	30.20%	13.20%	1.05%	8.01%

### INVESTMENT PERFORMANCE THROUGH DECEMBER 2012\*

	Current Month	Current Quarter	Last 12 Months	Last 3 Years	Last 5 Years	Last 10 Years
<b>Entire Fund Total</b>	<b>1.29%</b>	<b>1.86%</b>	<b>8.97%</b>	<b>6.89%</b>	<b>0.68%</b>	<b>6.49%</b>
Policy Index	1.25%	1.58%	11.11%	5.75%	0.46%	6.11%
S&P 500	0.91%	-0.38%	16.00%	10.87%	1.66%	7.10%

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



On January 9th, fourteen area synagogues and agencies began their journey to discover the benefits of legacy giving as participants of Create A Jewish Legacy Cohort II. Through Create a Jewish Legacy, our synagogues and agencies gain an

in-depth understanding of the planned giving process so that they can strengthen the financial outlook of their organizations from within.

The Federation, together with The United Jewish Endowment Fund, creates strong partnerships with agencies and synagogues as a community leader, convener and catalyzer so that we can plan strategically and effectively with a strong, collective voice. Create A Jewish Legacy is a prime example of how successful partnerships strengthen our community and ensure stability for years to come.

Recognizing that committees change over time and that leadership rotates in and out of positions, the seventeen agencies who participate with Cohort I have been invited to have their new committee members sit in on training sessions with Cohort II. This continuing education will ensure successful leadership training and sustainability of CJL at each organization. Please contact Jennifer Scher with any CJL related questions at 703-286-1039 or [jennifer.scher@shalomdc.org](mailto:jennifer.scher@shalomdc.org). For a full list of participants and for additional information, visit [JewishLegacyGW.org](http://JewishLegacyGW.org).

## Fee Structure Update

Beginning in July, UJEF made a slight modification to its fee structure for standard funds\* to make fees more consistent across fund types and to create a minimum fee that covers the costs of administering funds effectively. Most funds will not be affected by the new structure. Because the annual minimum fee is now \$250, funds with balances under \$25,000 are most affected by the new minimum.

Annual fees will continue to be calculated based on the average daily balance in each fund.

Minimum fee per year	\$250
Fee on the first \$500,000	1%
Fee on the next \$9.5 million	0.50%
Fee on all assets over \$10 million	negotiable

\*This fee structure applies to all funds and gifts with the exception of local partner agency/synagogue funds and gift structures or assets that require additional administration, such as trusts or real property. Family fund discounts remain unchanged.

While the minimum to open a fund remains \$10,000, there is no minimum balance requirement.

### Announcing the 14 participating partners with CJL Cohort II

Adat Shalom; Bethesda, MD

B'nai Israel Congregation; Rockville, MD

B'nai Shalom of Olney; Olney, MD

Chabad of Northern Virginia; Fairfax, Tyson's Corner, Reston-Herndon, Arlington-Alexandria

Charles E. Smith Jewish Day School; Rockville, MD

Congregation Adat Reyim; Springfield, VA

Congregation B'nai Tzedek; Potomac, MD

Jewish Primary Day School of the Nation's Capital; Washington DC

Kol Shalom; Rockville, MD

Ohr Kodesh Congregation; Chevy Chase, MD

Temple B'nai Shalom; Fairfax Station, VA

Temple Micah; Washington DC

The Jewish Federation of Greater Washington; MD/DC/VA

University of Maryland Hillel; College Park, MD