

Acorn Funds— Giving a Meaningful Bar/Bat Mitzvah Gift

Acorn Funds give you a way to build an endowment fund over time. When you seed an Acorn Fund, over time the investment will help the Acorn grow into a much larger endowment fund. Open an Acorn Fund now and watch it grow as your child or grandchild grows to adulthood.

When that child reaches adulthood, the Acorn Fund will begin supporting the Jewish community in his or her name, helping your bar/bat mitzvah child—now an adult—establish him or herself as an active member of the Jewish community. The guidelines for the Acorn Fund Program, briefly, are as follows:

- You contribute at least \$10,000. You may make your initial contributions over no more than four years.
- The Endowment Fund will invest your contribution until it reaches the fund size you target or for a maximum number of years (up to 30 years).
- Once the target amount or date is reached, the fund will become a permanent endowment. Distributions from the fund will then be made annually to benefit the Jewish community.
- You will be recognized for the target amount of the permanent endowment when you establish the fund.
- You or a loved one will be recognized for your annual gift once the fund begins annual distributions.

Throughout the year we will showcase these and other new initiatives that will serve our community in meaningful and forward looking ways. For more information, please see the contact information below.

FOR MORE INFORMATION, PLEASE CONTACT:

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\$15 Million Entrusted to The United Jewish Endowment Fund

Following an exhaustive national search, Women's American ORT Foundation has selected the United Jewish Endowment Fund (UJEF) of The Jewish Federation of Greater Washington to manage \$15 million of its endowment funds. This selection is a strong vote of confidence from a national organization. "We made our final decision based on the professionalism of the staff, the quality of investment advisers, the involvement of the investment committee and the UJEF's successful investment history," said Barbara Adler, Chair, Women's American ORT Foundation.

John VerStandig, Chair, Executive Committee for ORT America, added that "ORT has been a member of the Washington D.C. community for many years through its ORT America Chapter. We look forward to a long and mutually beneficial relationship with the UJEF, the Jewish Federation and the Jewish community of Greater Washington."

After this investment, the UJEF will manage nearly \$150 million on behalf of trusted fund holders, drawing together local, national and international funders to tackle critical community issues and strengthen and advance Jewish life.

To read more about UJEF visit shalomdc.org/ujef.

YOUR STATEMENT

2012

Making a Statement

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ACORN FUNDS
ORT ENDOWMENT



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 December 31, 2011.

The new year has started off with a lot of excitement for UJEF. Not only have we been entrusted with a \$15 million endowment from Women's American ORT Foundation (page 4), but we have also received all of the results from our recent customer satisfaction survey. Thank you to all who participated in this survey. Over the next few months, look for us to implement some new and exciting tools and programs, based on the feedback that we received from this survey. These new initiatives will help us keep you more connected to UJEF and other fund holders. We hope that you will join us and your fellow fund holders for the first of these new programs on March 25, for Good Deeds Day (page 3).

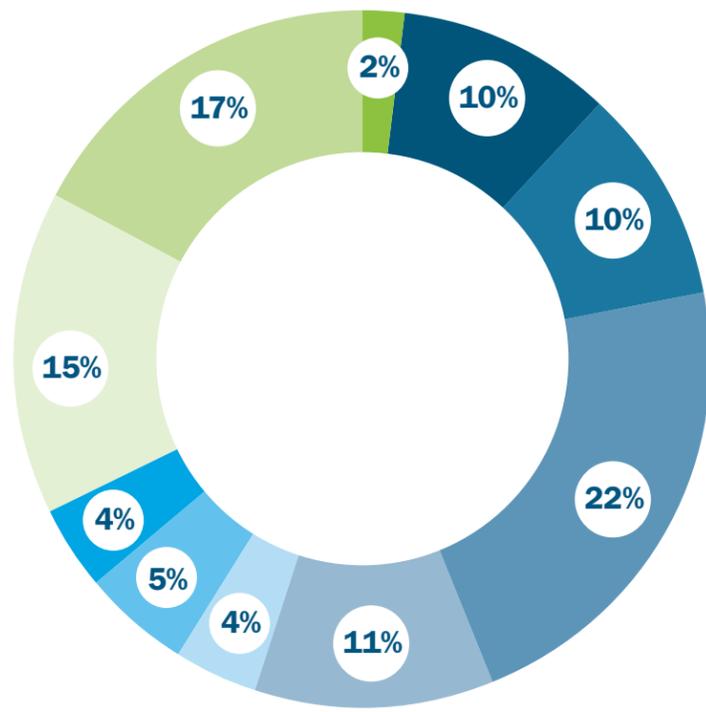
As always, we hope that you will contact us with any questions that you may have at 301-230-7230 or endowment@shalomdc.org.

Best Regards,

Ronald A. Paul, M.D.
President

Eileen Frazier
Managing Director

Portfolio Allocation December 2011

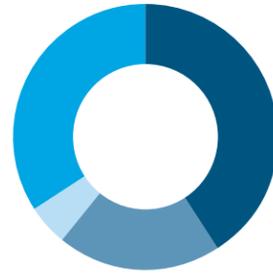


Equity 67%

- 10% Domestic Stocks
- 10% International Stocks
- 22% Long/Short and Event Driven
- 11% Private Equity
- 4% Private Real Estate
- 5% Public Natural Resources
- 4% Private Natural Resources

Fixed Income 33%

- 15% Credit Oriented Hedge
- 17% Fixed Income and Cash
- 2% Israel Bonds



Purpose of Investments in the Portfolio for December 2011

- 42% Stock Market Exposure
- 20% Return Enhancing
- 5% Inflation Oriented
- 33% Diversifiers



Liquidity Summary December 2011

- 33% Daily
- 14% Monthly
- 11% Quarterly
- 18% Annually
- 24% Illiquid

INVESTMENT PERFORMANCE THROUGH DECEMBER 2011						
	Current Month	Quarter	Last 12 Months	Last 3 Years	Last 5 Years	Last 10 Years
Entire Fund Total	-0.78%	1.87%	-2.26%	9.65%	0.71%	3.96%
Policy Index	0.16%	4.66%	-2.45%	8.25%	0.67%	3.75%
S&P 500	1.02%	11.82%	2.11%	14.11%	-0.25%	2.92%

CJL is going strong and preparing for the future



For the first cohort of Create a Jewish Legacy organizations, 17 partner agencies and synagogues have come together to learn the details of the planned giving process, and, more importantly, how to begin conversations about what is meaningful about our

Jewish experiences. These organizations will attend eight educational seminars that will be held over a two-year period; two have been held thus far (the third seminar will be held in February at the JCC of Northern Virginia).

The partner organizations are also in the process of creating case statements, which will be a critical piece for educating donors about the incredible breadth of services available in our community. Each case statement will reflect the values of that organization and will further educate donors about how legacy gifts can make a difference in ensuring the vitality of programs for years to come.

With the first cohort of organizations going strong, we are currently accepting inquiries for the second cohort group of the Create a Jewish Legacy program. The second cohort will begin in fall 2012. For more information please contact Jennifer Smith at 301-230-7211 or jennifer.smith@shalomdc.org or visit JewishLegacyGW.org.

Create a Jewish Legacy is an innovative program of the United Jewish Endowment Fund of The Jewish Federation of Greater Washington designed to transform philanthropy in this community by implementing a collaborative approach to legacy giving. It will build a strong, vibrant community for generations to come. Our actions today and in the future to secure bequests for permanent endowments will ensure that our Jewish organizations continue to thrive.

What does legacy giving mean to you?

The act of creating a legacy empowers you to complete the work of your heart and to enjoy the peace that it brings. By leaving a legacy, you insure that the Jewish traditions and institutions that mean so much to you now will exist for future generations.

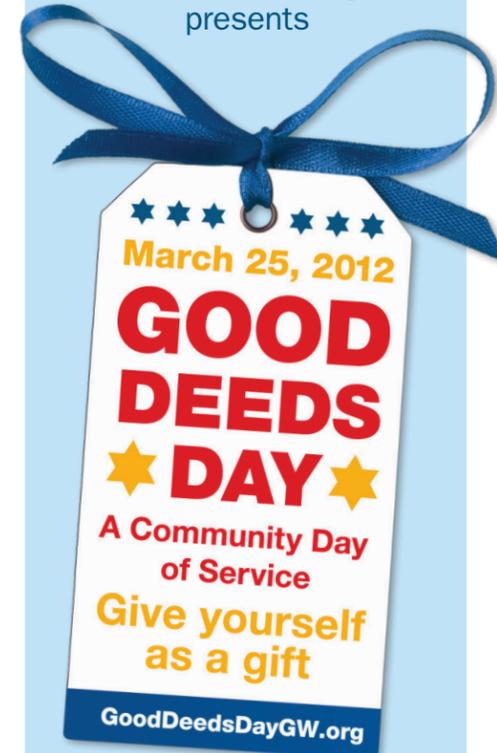
You can also receive special benefits from your future gift today as a member of the Legacy Society, our recognition society for individuals who have included UJEF/Federation in their will, created a permanent endowment, life income gift, such as a charitable gift annuity, or included UJEF/Federation as beneficiary of a trust, life insurance policy or retirement account.

We can work with you to create a lasting legacy for the Jewish community. If you have already included UJEF/Federation in your estate plans, we'd love to welcome you to the Legacy Society.

For more information, please see our contact information on page 4.

Upcoming Events

The Jewish Federation of Greater Washington presents



Because You Are the Best Gift Anyone Could Ever Ask For

On Sunday, March 25, 2012 the Jewish community of Greater Washington will join thousands of volunteers from around the world in an international day of community service.

To join a service project with a group of fellow endowment fund holders contact **Jennifer Smith** at **301-230-7211**.

To learn more about Good Deeds Day, call **1-888-246-1818** or visit **GoodDeedsDayGW.org**.