

## Five Tips for Engaging Your Teens in Philanthropy

### Volunteer

Consider finding an ongoing volunteer project that you can do together. Or find some way to support your child's choice of volunteer projects, such as hosting a fundraiser (in person or on-line). Consider making your next family trip a service trip.

### Listen

Expect that your children may not share your priorities. Ask open questions and encourage them to gather information on the cause or organization that interests them. Because convincing children to open up on your schedule may be challenging, try to find or make the time to listen when they seem ready.

### Raise the hard questions

Money creates power dynamics. What happens when you or your child gives money to a charity on which a classmate, friend, or colleague depends? How do your and your teen's values about money affect giving? Be prepared to dig into your own underlying attitudes toward money and the impact your views have had on your child.

### Relinquish some control

Encourage your children to research the causes and organizations they care about on their own. Let your children arrange a site visit. Let them plan the details for a fundraiser. Support their turning to peer networks instead of to you to energize their giving. Let them make mistakes.

### Consider opening a donor advised fund

If you have the resources, consider opening a donor advised fund with UJEF from which your children can advise grants to charities. Such a fund expresses significant confidence in your children's judgment, gives them a team of philanthropy experts who are not their parents to turn to and makes sure that your children only use the money for charity.

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# SUPER SUNDAY



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The Jewish Federation  
OF GREATER WASHINGTON

## YOUR STATEMENT

YEAR-END 2013

# Making a Statement

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SUPER SUNDAY

## Message from the President and Managing Director

Welcome to *Making A Statement*, a newsletter from The United Jewish Endowment Fund (UJEF). In the following pages, you will find the latest news from UJEF as well as investment performance of our assets under management.

2013 was an incredible year! We are proud to announce that the total financial resources raised in 2013 by the Federation and UJEF was \$41,360,000. This includes:

- \$19,700,000 in commitments for the Annual Campaign – an increase of \$200,000 over last year's total.
- \$17,400,000 for the UJEF – bringing the total UJEF assets under management to over \$185 million, an increase of \$40 million over the past 2 years.
- \$4,260,000 in Directed Gifts – for new initiatives in the community.

We're also thrilled to tell you that we were selected to participate in two very competitive national programs. First, we were selected from Jewish communities across the country to receive multi-year grant support from the Jewish Federation of North America's Domestic Endowment Fund in order to continue Multigenerational Family Philanthropy Training work with 21/64, a consulting arm of the Andrea and Charles Bronfman Philanthropies and experts in family philanthropy. The next phase of training will multiply the tools we can use to continue working with the staff, Federation Board, donor families and young adults inheriting wealth and will help us move toward becoming the center for Jewish philanthropy in Washington, DC.

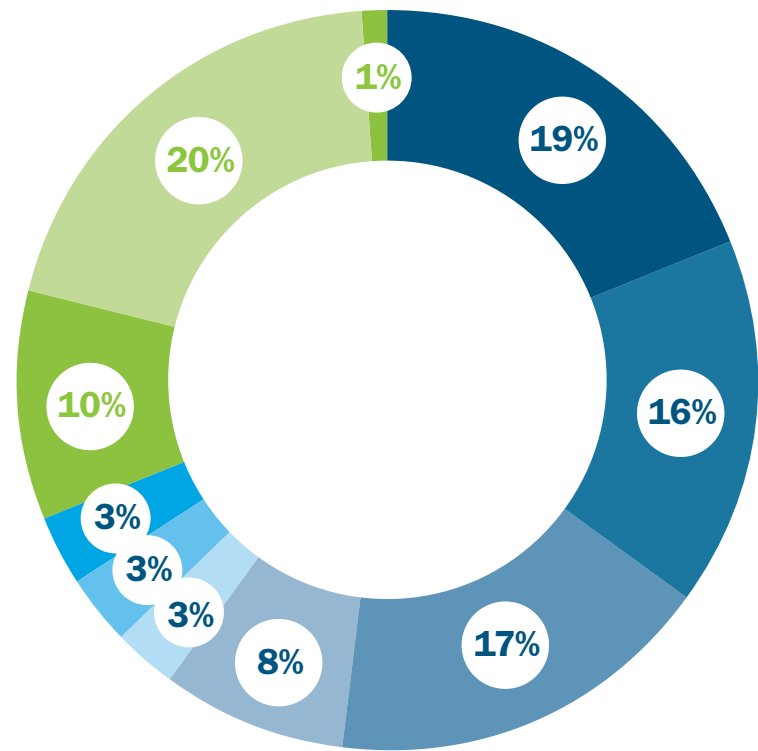
The second program is a competitive grant from the Harold Grinspoon Foundation's LIFE & LEGACY program. Support from this program will provide training sessions and materials and will enable UJEF to provide an incentive award to CJL partner agencies and synagogues that are able to secure new legacy commitments for their organization. If you have included one or more of our CJL partners in your estate plans, let them know – you could help your favorite agency/synagogue secure a cash award, in addition to providing a lasting commitment for their future.

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 December 2013



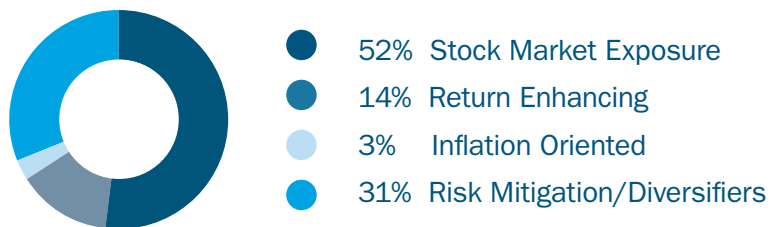
### Equity 69%

- 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

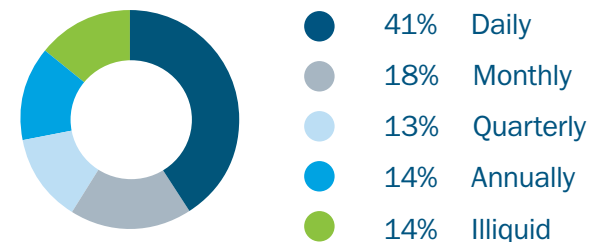
### Fixed Income 31%

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

### Purpose of Investments in the Portfolio for December 2013



### Liquidity Summary December 2013



### INVESTMENT PERFORMANCE THROUGH DECEMBER 2013

	Current Month	Current Quarter	Last 12 Months	Last 3 Years	Last 5 Years	Last 10 Years
<b>Entire Fund Total</b>	<b>1.68%</b>	<b>4.77%</b>	<b>14.99%</b>	<b>6.79%</b>	<b>10.76%</b>	<b>6.25%</b>
Policy Index	0.96%	4.33%	12.97%	6.96%	10.39%	5.69%

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

## Directed Giving Spotlight

We have the privilege of helping support and build meaningful programs that engage young adults and build Jewish identity. We would like to introduce to you two successful programs, **Masa Israel Journey** and **Moishe House**, that build and sustain connections among local young adults. These two programs have the potential to help shape our community's future.

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 301-230-7352 or [avital.ingber@shalomdc.org](mailto:avital.ingber@shalomdc.org).



**Masa Israel Journey** connects Jewish young adults, ages 18-30, to gap year, study abroad, volunteer and internship programs. Through these immersive experiences lasting between five and twelve months, participants develop a deep, personal connection to Israel and Jewish life, and become Jewish leaders and lifelong advocates for Israel. Masa Israel participants gain incredible global perspective, networking opportunities and real professional experience while exploring Judaism.

Support of Masa Israel Journey ensures that young adults in the Greater Washington area are aware of these immersive Israel opportunities and that the organizations working with them are equipped with the tools and resources necessary to help them get there.



Thousands of young adults build connections to one another through community-wide events in our area.



**Moishe House** is the largest international and pluralistic organization dedicated specifically to engaging young Jews in their 20s. They train, support and empower young Jewish leaders as they create vibrant home-based communities for themselves and their peers. By placing the resources directly in the hands of passionate and energized 20-somethings across the globe, Moishe House residents connect their peers to Jewish community on their terms.

Since first opening in 2007, the local Moishe Houses have hosted over 1,300 individual programs, attracting over 25,000 program attendees. Moishe Houses across the globe are supported by their local communities, and here in the Greater Washington area, we are looking for additional support to sustain and expand their outstanding young-adult networks (Adams Morgan, North Bethesda, and Arlington). Given the unique model, the ROI is high and funds raised will be used to directly support the collective 20+ local programs happening each month.

### Thank You Calls

Have you gotten a phone call lately from one of our Trustees?

Our Trustees want to reach out to you, the Endowment Fund donors, to thank you for your support and ask for your advice on what we could do better. If you haven't yet received a call from us, expect one in the next few weeks. The calls that Trustees have made so far have had a great response.

Ruth Silberg, United Jewish Endowment Fund Trustee and Federation Board Member, is chairing the Thank You Project. Ruth remarked, "this effort has three goals in mind, (1) we want to thank you, (2) we want to check in on how we are doing, and (3) we want to find out how we can help you."

Phyllis Margolius, UJEF Trustee Emeritus and past President of both The Federation and UJEF, has enjoyed making calls. "I couldn't have had more positive conversations. The donors love that I call to thank them for donating to the fund. People very much appreciated a phone call that was not a solicitation."

As a result of your input, we now mail *Making a Statement* to all planned giving donors and Legacy Society members, not just to donor advised fund and outright fund holders. In addition, we've assisted donor advised fund advisors in switching to the new and improved Donor Web online system to view fund information and request grant distributions.

We look forward to the conversations and to hearing your feedback.