

Holocaust Survivors' Community Fund

In our community, an astounding number of Holocaust survivors live below the poverty line. Nearly 200 of these individuals turn to the Jewish community for help through the Jewish Social Service Agency (JSSA). JSSA provides very basic safety net services like bathing assistance, light housekeeping, delivery of kosher Meals-on-Wheels and escorted transportation to medical appointments.

Last year at this time, the Holocaust Survivor program at JSSA was facing enormous financial deficits. In response to this crisis, The Jewish Federation of Greater Washington partnered with JSSA to create the Holocaust Survivors' Community Fund, managed by the United Jewish Endowment Fund. The initial response to meet the fund's \$5 million goal has been overwhelming, with more than \$2 million raised to date. These dollars have made the following changes:

- JSSA has lifted the suspension of program admissions for eligible clients;
- The 49 people who were on a waiting list for care are now being served;
- The maximum allowable number of home care hours available per week has been restored to 25 hours, if needed – increased from a low of 15 hours;
- The number of “door-through-door” escorted transportation trips for medical appointments has been restored to a total of four visits per month, up from two;
- The amount of immediate cash assistance (food cards, prescription costs, emergency needs) has been increased from \$750 to \$1,000 per individual client, per year.

Want to help? As some survivors are becoming widowed and homebound, they welcome a friendly visit to help them feel more connected to the world outside. Volunteering might include chatting over a cup of tea (Russian speakers are particularly needed!), taking a leisurely stroll, sorting and labeling photos or cooking a favorite dish together. If you would like to volunteer, please contact Toby Rabbin at 301-610-8395.

The Holocaust Survivors' Community Fund exists only to support services provided directly to the neediest Holocaust survivors living in the Greater Washington area. To make a donation or to learn more about the fund, contact The Federation's Chief Development Officer, Avital Ingber, at 301-348-7352 or avital.ingber@shalomdc.org or JSSA Development Director, Lori Ulanow, at 301-610-8343 or lsulanow@jssa.org for further information.

FOR MORE INFORMATION, PLEASE CONTACT:

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GRANTS AVAILABLE

Increased Funding for Israel
Quest Grants, 2013-2014



Israel Quest is a need-based grant program that strives to enhance a teen's connection to the Jewish community, Israel and other Jewish teens. The grants provide support based on the length of the teen's approved program in Israel. Israel Quest is founded on the guiding principle that a formative Israel experience will forge a strong Jewish identity in the hearts and mind of our community's teens.

New grant amounts available:

- \$750 for 3 weeks in Israel
- \$1,500 for 4-5 weeks in Israel
- \$1,750 for 6-12 weeks in Israel
- New level: \$2,250 for teens enrolled in approved trips of 13 weeks or longer in Israel

For more information, visit shalomdc.org/israelquest. The Israel Quest Grant Program is funded and administered by the United Jewish Endowment Fund and The Jewish Federation of Greater Washington.

YOUR STATEMENT

SUMMER 2013

Making a Statement

TABLE OF CONTENTS

1

WELCOME

2

INVESTMENT PORTFOLIO
SUMMARY

3

STRATEGIC PHILANTHROPY
DONOR FEATURE

4

HOLOCAUST SURVIVORS' FUND
ISRAEL QUEST FUNDING

Message from the President and Managing Director

L'Shanah Tovah! 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.

We would like to extend a heartfelt thank you to outgoing UJEF President, Dr. Ronald Paul. Under Dr. Paul's two-year leadership, UJEF assets under management grew from \$138 million to nearly \$170 million (as of June 30, 2013). In addition to substantial growth in assets during that time, UJEF distributed grants totaling in excess of \$22.5 million over that two-year period. Dr. Paul's commitment and passion for growing the Endowment Fund were inspirational.

We also want to thank the UJEF Trustees whose terms ended in June: David Eppler, Michael Gildenhorn and Louis Mayberg. We thank each of you for all you have done for UJEF and the Jewish community. Please join us in welcoming new UJEF Trustees, Jocelyn Krifcher and Mindy Strelitz. Their leadership and dedication to the Jewish community will be an asset to UJEF.

It has been a busy summer! Recent UJEF grants are enriching lives and strengthening our Jewish community. Through UJEF grant support, the PJ Library program is expanding across Greater Washington. PJ Library distributes age-appropriate Jewish books and music to children ages six months to eight years old. The program also co-sponsors Jewish activities to engage and welcome families. Over 3,000 families have already signed up. For more information, visit shalomdc.org/pjlibrary.



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

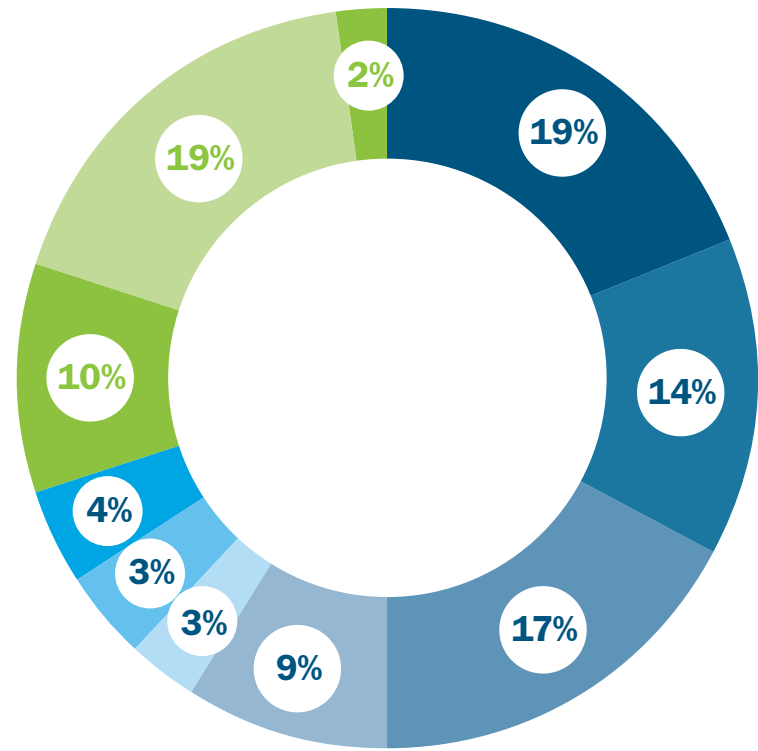
Best Regards,

Mark Levitt, *President*
Eileen Frazier, *Managing Director*

P.S. You can stay up-to-date on charitable giving with our eNewsletter. Visit shalomdc.org/ujef and click on the “eNewsletters” link on the right. If you are in the financial, estate or tax planning field, click “For Advisors” to sign up for an industry-specific newsletter.



Portfolio Allocation June 2013



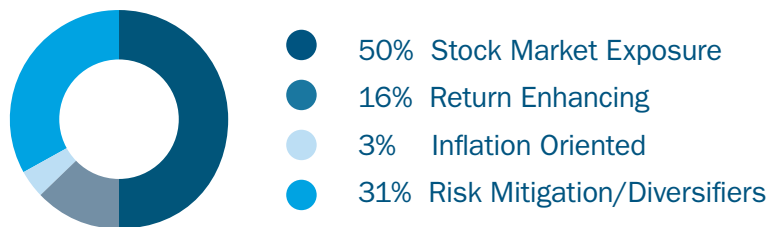
Equity 69%

- 19% Domestic Stocks
- 14% International Stocks
- 17% Long/Short and Event Driven
- 9% Private Equity
- 3% Private Real Estate
- 3% Public Natural Resources
- 4% Private Natural Resources

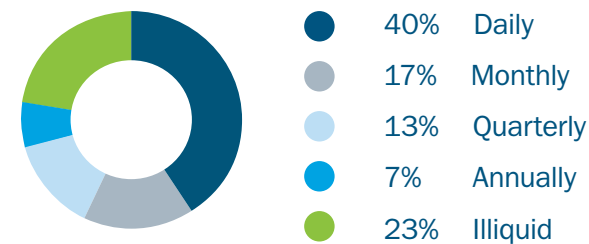
Fixed Income 31%

- 10% Credit Oriented Hedge
- 19% Fixed Income and Cash
- 2% Israel Bonds

Purpose of Investments in the Portfolio for June 2013



Liquidity Summary June 2013



INVESTMENT PERFORMANCE THROUGH JUNE 2013

	Current Month	Current Quarter	Last 12 Months	Last 3 Years	Last 5 Years	Last 10 Years
Entire Fund Total	-2.31%	4.73%	11.04%	8.16%	2.29%	6.41%
Policy Index	-2.27%	3.04%	10.17%	8.78%	2.15%	5.59%

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

Using Complex Business Assets in Charitable Planning

If you hold complex business assets that have appreciated in value, using those assets in your philanthropic plan may offer great tax advantages and help you achieve your philanthropic goals.

Example 1: Using Pre-Sale Private Securities in a Donor Advised Fund

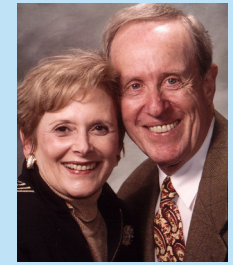
If you expect that your privately held business interests will be sold, consider giving some or all of the assets to a donor advised fund (DAF) at UJEF before the sale. You get a tax deduction for the fair market value of the assets when you make the gift. Neither you nor the Endowment Fund will owe capital gains tax on the assets' appreciation. After the sale of the assets in the DAF, you can recommend grants from the fund at your convenience to public charities of your choice for years to come. You can include your children as advisors, engaging them in your family philanthropy. DAFs can offer an uncomplicated alternative to private foundations, and they operate well on a smaller scale, which foundations do not. For the best tax benefits, be sure to complete your gift to the DAF before any sale or reorganization agreement is final.

Example 2: Using Illiquid Assets for Future Income and a Charitable Legacy

Consider putting privately held business interests or real estate into a FLIP-charitable remainder trust. With a basic charitable remainder trust, as soon as the trust opens, a percentage of the trust's value will go to you or a loved one each year for life or a chosen number of years. When the trust ends, the assets remaining in the trust establish your philanthropic legacy. In a FLIP trust, the annual payouts wait until the trust sells the illiquid assets (the sale is the flip), which can be years after the trust opens. You get a charitable tax deduction in the year that you make the gift. Neither you nor the trust pay capital gains tax on your gift. This gift structure is great for retirement planning or providing extra income for someone special in your life.

Many variations for these options and other plans are possible. Gifts of complex assets should reflect your individual financial needs and philanthropic vision. If you own complex assets such as real estate, privately held securities, employee stock ownership plan (ESOP) shares, partnership interests or LLC interests, call Elizabeth Goldstein at 301-230-7228 or talk with your professional advisors about the best plan for you.

Donor Feature: Joan and Don Sacarob



"In 1969, with lots of passion and hard work, a network of community leaders brought to

life Camp Achva, the precursor to the establishment of the JCCNV. Because of this commitment, we named the JCCNV as a beneficiary in our will and we recognize the importance of encouraging others to do the same. Our legacy ensures that future generations will always have the JCCNV as their hub for meaningful Jewish experiences in Northern Virginia."

— Joan and Don Sacarob, JCCNV Create A Jewish Legacy Chairs



Jewish tradition teaches us that it is our responsibility to make the world a better place for future generations. To learn more about how you can Create A Jewish Legacy, contact Jennifer Scher at 703-286-1039 or visit JewishLegacyGW.org.

Visit shalomdc.org/savethedate for a listing of upcoming Federation events.