

Making an Impact

The United Jewish Endowment Fund's matching gift program doubles the impact of our generous donors as they work to empower Jewish innovation. Below are two examples where the UJEF has partnered with donors to fund innovative and entrepreneurial ventures. If you are considering a philanthropic investment in a new or innovative Jewish project and want to explore opportunities for UJEF partnership, please contact us.

GATHER THE JEWS



Gather the Jews (GTJ) facilitates Jewish life in Washington, DC by providing young adults with up-to-date and accurate information about the city's robust offerings of Jewish and social, religious, and learning opportunities. GTJ endeavors to connect Jews to organizations, organizations to Jews, and Jews to Jews to bridge the gap between young adults and the DC Jewish community while highlighting the incredible offerings, and the incredible young Jewish adults, that exist in DC.

PROGRAM IMPACT

- This year GTJ will usher in a bold new phase for Jewish young adults in Washington, DC as they pilot a relationship-based model to enable individuals to further explore their Jewish journeys and find connections within the robust DC community.
- GTJ has been the preeminent resource for young adults seeking a connection to the DC Jewish community through information provided on its website, its 4,500+ person listserv and its GTJ monthly Happy Hours.
- GTJ will create peer-Fellowships in which relationship-based engagement is a primary way to connect young Jewish adults to Jewish life in DC.

HONEYMOON ISRAEL



Honeymoon Israel provides highly subsidized, immersive, impactful trips to Israel for young couples with at least one Jewish partner. The 9 day experience creates an enriching, provocative, fun and inspirational relationship with Israel for every couple, all of whom are committed to the exploration of raising Jewish families. The trip is designed to inspire and strengthen the relationship of the couple, to build group cohesion, and to enhance and enrich our young Jewish community.

PROGRAM IMPACT

- The inaugural Honeymoon Israel trip from the Greater Washington area is scheduled for October 29-November 7, 2015.
- Honeymoon Israel has received many times the number of applications compared with the number of spots available on the Inaugural trip.
- Each couple will receive a philanthropic subsidy of \$7,300, making their contribution to the trip \$1,800.
- Honeymoon Israel seeks to support couples in their own exploration and to foster the organic development of community.
- Through local partnerships, Honeymoon Israel works to expose couples to existing institutions, as well as the resources to create new initiatives with other couples in order to develop micro-communities with other Honeymoon Israel couples.

Contact the United Jewish Endowment Fund to apply for a matching grant to help make your philanthropic dreams a reality.

Elan Burman, Director of Planned Giving, 301-230-7211 or elan.burman@shalomdc.org.

The Jewish Federation of Greater Washington

6101 Executive Blvd., Suite 100
North Bethesda, MD 20852

YOUR STATEMENT

QUARTER 3/2015

Making a Statement

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Message from the President and Managing Director

We write this message on *Yom Hazikaron*, Israel's Memorial Day, a most somber day in which Israel honors her fallen soldiers and the victims of terror. Avital is in Israel and witnessed first-hand the entire country come to a complete halt. At 8:00 p.m. and then again at 11:00 a.m. on the following morning, every driver stops their car on the side of the road, gets out and stands at a halt for the duration of the siren. One cannot help but pause at the thought of all of the potential human talent that has been lost. Among the fallen, how many would have earned the Nobel Prize, cured a major illness or simply brightened this world through acts of kindness and philanthropy? It is a sobering thought.

Yet, as has been noted by many, Israel goes directly from its day of collective mourning into *Yom Ha'atzmaut*, her Independence Day. Everywhere you turn there is an Israeli flag, the forests are filled with people having cook outs and the streets are filled with singing and dancing. One would be hard pressed to find a greater juxtaposition of national sentiment.

The contrast of these two days is most certainly an articulation of Jewish tradition and teachings. While we mourn so much pain and suffering, endured by too many generations of our people, we use this as fuel to enhance our understanding of the value of life and our fleeting opportunity to have an impact on our world. From the hardship, we derive strength and motivation to work tirelessly for a brighter tomorrow, while we have the opportunity to do so.

A central component to the work of the United Jewish Endowment Fund is our legacy initiative, whereby members of our community are asked to make provisions for the Jewish community in their estate plans. This program ensures that our community will be enriched, materially enhancing the lives of those affected through the work of The Jewish Federation of Greater Washington and its numerous partners. It is once again our privilege to articulate a thank you to the generations who have created for us, and those among us, who have created for tomorrow.

In this edition of Making a Statement, we invite you to read more about our Create a Jewish Legacy Program; learn more about the various projects of UJEF and, most importantly, to pause and derive satisfaction from the knowledge that your actions have and will continue to foster a bright future.

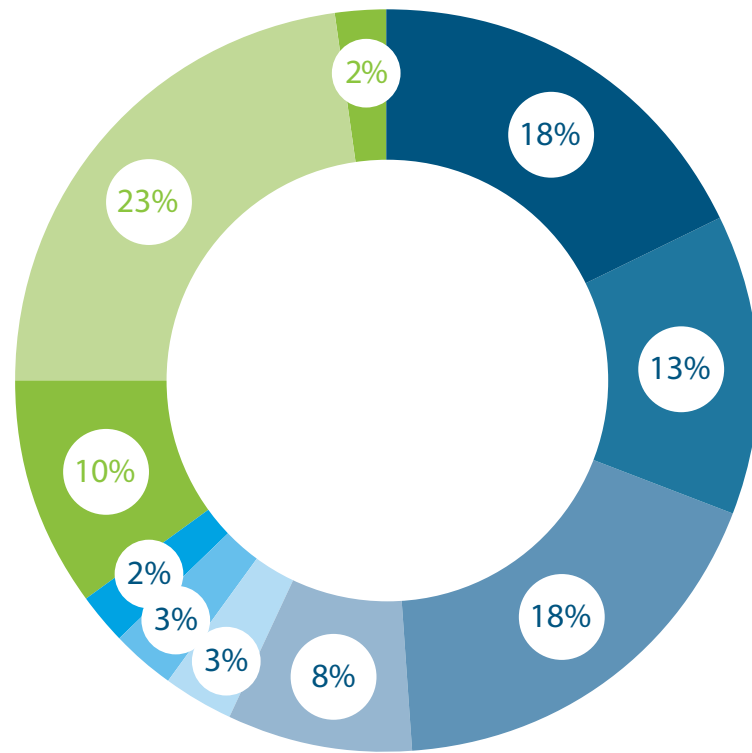
Wishing Israel a *Yom Huledet Sameach*—Happy 67th Birthday!

Best Regards,

Mark Levitt, President
TheOfficeofMarkLevitt@shalomdc.org

Avital Ingber, Managing Director
Avital.Ingber@shalomdc.org

Portfolio Allocation March 2015



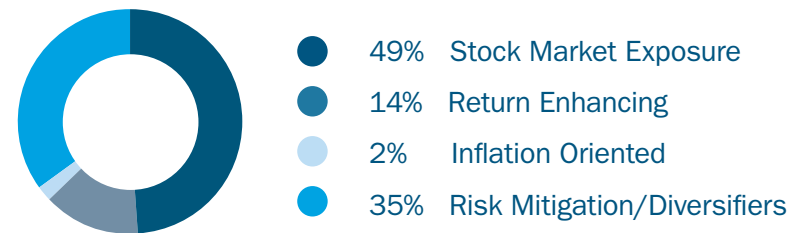
Equity 66%

- 18% Domestic Stocks
- 13% International Stocks
- 18% Long/Short and Event Driven
- 8% Private Equity
- 3% Private Real Estate
- 3% Public Natural Resources
- 2% Private Natural Resources

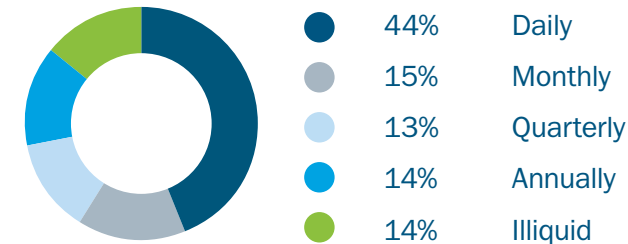
Fixed Income 34%

- 10% Credit Oriented Hedge
- 23% Fixed Income and Cash
- 2% Israel Bonds

Purpose of Investments in the Portfolio for March 2015



Liquidity March 2015



INVESTMENT PERFORMANCE THROUGH MARCH 2015

	One Month	Quarter	One Year	Three Years	Five Years	Ten Years
Entire Fund Total	-0.67%	2.29%	3.28%	7.26%	7.29%	5.84%
Policy Index	-1.05%	1.52%	3.24%	7.01%	6.73%	5.36%

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

Create a Jewish Legacy

The economic tumult of 2008 sent shockwaves throughout almost every sector. The non-profit community was no exception, with numerous non-profits shuttering their operations and more still seeing significant contractions to their budgets. Yet, it is precisely during these periods of economic decline that non-profit services and goods are most in demand. The experiences of these past seven years have caused non-profits to place substantially more attention on increasing their endowment funds and resources. By building endowment resources, non-profits ensure their fiscal stability during economic difficulties. During times of prosperity, endowment income is often used to finance entrepreneurial and innovative programming that substantially enriches communal life.

In endowment funds one sees the ability to both sustain what the collective efforts of generations have built, and, also, the funding to accelerate Jewish communal R&D. The United Jewish Endowment Fund at The Jewish Federation of Greater Washington has, for several years, been running an initiative called Create a Jewish Legacy (CJL). Chaired by Yvonne Distenfeld and Ellen Tillman, CJL is a community-wide initiative that equips participating agencies and synagogues with the resources, know-how and tools to build their own endowment resources, primarily by asking stakeholders of the participating agency to make philanthropic provision in their final estate plans.

The UJEF has been greatly enabled in its efforts through a strategic partnership with the LIFE & LEGACY Program of the Harold Grinspoon Foundation. The Harold Grinspoon Foundation has positioned itself as a national thought-leader and coordinator of efforts to grow legacy giving within Jewish

communities around the nation. Organizations participating in the Greater Washington Create a Jewish Legacy Initiative have already yielded 309 legacy commitments, with an estimated value of \$14,590,000. However, beyond the organizational impact, one must recognize the importance of bequests in articulating the donor's vision and values to his/her loved ones and community. Bequests illustrate, in a very poignant way, the consideration of the donor for his/ her broader community. Bequests provide the knowledge that peoples' lives are being enriched and enhanced in perpetuity.

Through financial planning, estate gifts can often exceed the philanthropic contributions the individual was able to effect. Furthermore, in some circumstances, through through annual gifts, bequests can mitigate estate taxes. Most importantly, legacies and bequests can materially enrich the fabric of Jewish life in this region for generations to come.

The United Jewish Endowment Fund thanks all of those who have made provision for our community. We also wish to celebrate the efforts of lay-leaders and staff throughout our community working to ensure that our children have access to Jewish opportunities and resources beyond those we ourselves have experienced and enjoyed.

To learn more about the Create A Jewish Legacy program, visit www.jewishlegacygw.org or contact Elan Burman, Director of Planned Giving, at 301-230-7211 or email elan.burman@shalomdc.org.

Agencies and Synagogues participating in CJL include:

- Adat Shalom
- Agudas Achim Congregation
- Beth El of Montgomery Country
- Beth Sholom Cong. & Talmud Torah
- B'nai Israel Congregation
- B'nai Shalom of Olney
- Capital Camps & Retreat Center
- Chabad of Northern Virginia (Arlington/Alexandria)
- Chabad of Northern Virginia (Fairfax)
- Chabad of Northern Virginia (Reston/Herndon)
- Chabad of Northern Virginia (Tyson's Corner)
- Charles E. Smith Jewish Day School
- Congregation Adat Reyim
- Congregation B'nai Tzedek
- Congregation Olam Tikvah
- Geshet Jewish Day School
- JCC of Greater Washington
- JCC of Northern Virginia
- Jewish Community Relations Council
- Jewish Council for the Aging
- Jewish Foundation for Group Homes
- Jewish Historical Society of Greater Washington
- Jewish Primary Day School of our Nation's Capital
- Jewish Social Service Agency
- Kol Shalom
- Melvin J. Berman Hebrew Academy
- Ohr Kodesh Congregation
- Temple B'nai Shalom, Fairfax Station
- Temple Micah
- The Jewish Federation of Greater Washington
- University of Maryland Hillel
- Washington DC JCC
- Yeshiva of Greater Washington