

Your end-of-year giving

As 2016 comes to a close, we want to ensure that gifts you intend to make before December 31st arrive in time.

Please start standard stock transfers (DTC) by December 15th. We **must** receive any standard stock transfers, mutual fund or less routine stock transfers (ACAT) by **December 31st**, and transfers can take longer than anticipated at year end.

Find more details at shalomdc.org/security-transfer-instructions or contact Federation's Donor Center at 301-230-7239.

We also accept checks and credit card donations through the end of the year. Visit shalomdc.org/donate to learn more or make your gift.

Upcoming events

Learn more at shalomdc.org/events



Sayin' Thanks

Sunday, January 29, 2017

Join hundreds of volunteers of all ages from our Jewish community to make calls of appreciation to the extraordinary Federation donors who make it possible for us to build a stronger Jewish community locally, in Israel and around the world.



The Network Event

Thursday, March 16, 2017

Save the date for the must-attend networking event of the year, featuring a renowned speaker and the chance to network with over 400 professionals from a cross-section of industries across Greater Washington's Jewish community.

The Jewish Federation of Greater Washington

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

For more information about UJEF, please contact Avital Ingber at avital.ingber@shalomdc.org or 301-348-7352.



JOIN THE JEWISH FEDERATION OF GREATER WASHINGTON FOR

ISRAEL YOUR WAY

October 22-29, 2017

shalomdc.org/israelyourway

Travel through Israel this fall on a one-of-a-kind, customizable and multi-generational journey. Optional trip add-ons available.



YOUR STATEMENT

FALL/WINTER 2016

Making a Statement

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YOUR END OF YEAR GIVING

Message from the President and Managing Director

Dear Friends,

With Chanukah right around the corner, many of us are preparing to celebrate with family and friends, and to acknowledge the gifts we've received and the miracles we've experienced. The Jewish Federation of Greater Washington's United Jewish Endowment Fund (UJEF) team is grateful to you for the confidence you've placed in us as your partner in philanthropy. Your support creates miracles every day through the work we accomplish together. You help aging Holocaust survivors live with dignity and independence, teach Jewish children about the miracles of Chanukah and engage the entire community in *tikkun olam* (repairing the world).

As we near the end of 2016, we know that charitable giving may be on your mind. Federation's UJEF stands ready to assist you in making the most of your year-end charitable goals. Consider these options as you plan:

- **Making a distribution from your Donor Advised Fund (DAF)?** Submit your requests on DonorWeb by December 15th to ensure that your donation is made by year-end.
- **Wondering about the future value of charitable tax deductions?** Open a donor advised fund or pre-pay future years' charitable gifts now while you know how much your deduction is worth. Call 301-348-7352 for details.
- **Over 70 1/2 and wondering what to do with your IRA's Required Minimum Distribution (RMD)?** Charitable rollover of RMDs can make an excellent gift vehicle, helping you to avoid taxable income. Please call us for additional information.

On behalf of the UJEF Board of Trustees and the entire staff, we wish you a season filled with the warmth and light of Chanukah and a happy and healthy new year for you and your family.

Sincerely,

Norman Pozez
President, Federation's UJEF

Avital Ingber
Managing Director, Federation's UJEF



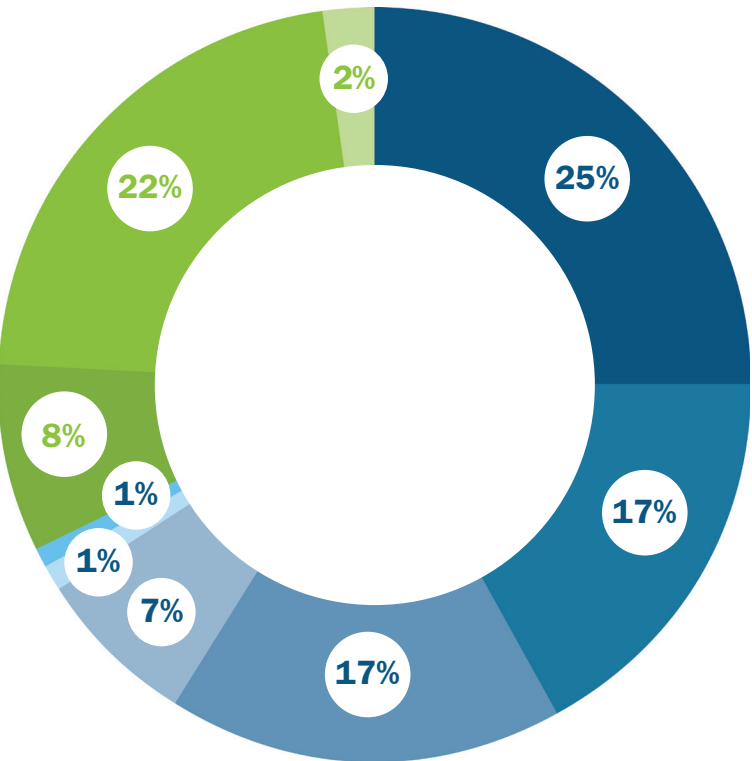
The Jewish Federation
OF GREATER WASHINGTON

United Jewish
Endowment Fund

What's your BIG IDEA?

If you have an innovative, entrepreneurial project for the betterment of our Jewish community locally or in Israel—we can help you transform your idea into a reality. Federation's UJEF has a matching grants pool that is available to help donors create successful ventures. For example, the opening of Café Sunflower & Bakery, Sunflower Bakery's storefront located in Federation's building, stemmed from our grants committee matching the investment of a donor's idea. **If you have a bold initiative in mind, please contact Avital Ingber at avital.ingber@shalomdc.org or 301-348-7352.**

Portfolio Allocation September 2016



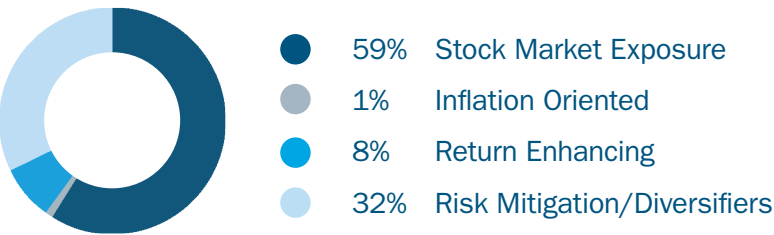
Equity 68%

- 25% Domestic Stocks
- 17% International Stocks
- 17% Long/Short and Event Driven
- 7% Private Equity
- 1% Private Real Estate
- 1% Private Natural Resources

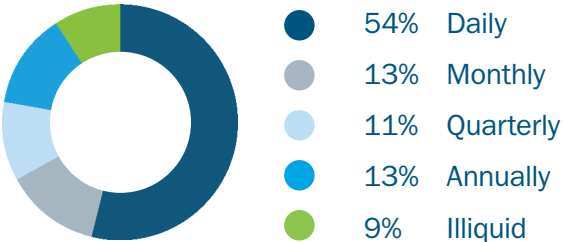
Fixed Income 32%

- 8% Credit Oriented Hedge
- 22% Fixed Income and Cash
- 2% Israel Bonds

Investment Characteristics September 2016



Liquidity September 2016



Investment Performance through September 2016							
	One Month	Quarter	YTD	One Year	Three Years	Five Years	Ten Years
UJEF	0.67%	4.19%	5.09%	6.37%	3.64%	6.42%	4.89%
Policy Index	0.44%	3.50%	5.59%	8.01%	3.67%	7.02%	4.02%

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

Meet the newest members of our team!

Federation’s United Jewish Endowment Fund is thrilled to have three exceptional new colleagues working with us to turn your philanthropic dreams into reality. Adam, Amy and Sarah look forward to getting to know and working with you in the coming year.



Adam Nilsen is the Endowment Relations Officer for Federation’s UJEF. After graduating from the University of Maryland in 2014 with a degree in Finance and Marketing, Adam joined The Jewish Federation of Greater Washington’s UJEF team as the Donor Relations Associate. His passion for interacting with donors along with his knack for manipulating data allowed him to grow into his new donor-focused, data-driven role.



Amy Shapiro Moffatt is Federation’s UJEF Donor Relations Associate. Amy comes to Federation with a financial services background, having worked in compliance and as a financial advisor. In her new role, Amy is working with donors on stock gifts and Donor Advised Fund distributions.



Sarah Arenstein joins Federation’s UJEF as the Senior Philanthropic Officer overseeing the Create a Jewish Legacy program, with a focus on building relationships with legacy donors and expanding UJEF’s work in the area of multi-generational family philanthropy. Previously, as Director of Federation’s Young Leadership division, Sarah served as a bridge between young adults and Federation.

Important investment update

Every five years, following our policies and industry best practices, our Investment Committee conducts a Request for Proposals (RFP) for an investment advisor for Federation’s UJEF. We are pleased to report that, after a rigorous review including both lay and professional leaders, our Investment Committee has decided to continue its relationship with our existing investment advisor, Graystone Consulting. Throughout the process, the Committee remained dedicated to examining in detail

the strengths and weakness of our current advisor and the leading prospects in the field. The Committee concluded that Graystone’s combination of investment advice, customer service, and competitive rates provide the best option for us.

Thank you to Randy Levitt for his thoughtful leadership as the RFP Committee Chair, and to the rest of the RFP Committee members for their time and dedication to ensuring Federation’s UJEF is successful.