The United Jewish Endowment Fund (UJEF) can help improve your organization’s investment diversification and quality by pooling your assets with those of other donors, endowments, agencies, organizations and congregations.

At A Glance

- Partner agencies of The Jewish Federation of Greater Washington and other local Jewish organizations and congregations may establish investment Funds with UJEF.
- Agencies gain access to investment opportunities available only to larger investors.
- Agencies retain ownership of their assets.

Why Invest with UJEF?

- Organizations with limited assets may be unable to access certain investment options that they would prefer to use to achieve investment diversity and steady returns.
- UJEF can help. We enable congregations and Jewish agencies to pool their invested assets with those of other UJEF funds. Together, all participants gain access to fund managers requiring larger investments than accessible by any one congregation or agency.

How are funds Invested?

- UJEF has an Investment Committee and a professional investment consulting firm that actively guide the pooled investment fund.
- The funds invested are easily accessible within 10 business days. Withdrawals of at least $100 each can be made once per month.
- Each organization will get monthly statements reflecting starting and ending balances, additions, distributions, and realized and unrealized gains and losses.

The United Jewish Endowment Fund of Greater Washington
Why Invest with UJEF?

Organizations with limited assets may be unable to access certain investment options that they would prefer to use to achieve investment diversity and steady returns.

What else does your organization need to know?

- The value of assets in an Agency Investment Fund is subject to fluctuations in the stock market and interest rates.
- Investing Agencies should consult with their own advisers regarding the risks, tax treatment and other aspects of investing with an Agency Investment Fund at the UJEF.
- Your organization may withdraw its funds, with notice, if you decide that your assets would be better invested elsewhere.
- Details of the UJEF investment performance history, a copy of an Agency Fund Agreement, and a schedule of subsidized nominal fees are available on request.

The United Jewish Endowment Fund of the Jewish Federation of Greater Washington strives to help our community provide an enriched Jewish life today and a vibrant Jewish tomorrow. The Endowment Fund connects philanthropists with opportunities to meet Jewish needs and tikkun olam—repairing the world. Together, we strengthen and advance Jewish life in the Greater Washington area and around the world.

Your organization may withdraw its funds, with notice, if you decide that your assets would be better invested elsewhere.

Details of the UJEF investment performance history, a copy of an Agency Fund Agreement, and a schedule of subsidized nominal fees are available on request.

For more information, please contact:

Elizabeth R. Goldstein, Esq.
Deputy Director, United Jewish Endowment Fund
elizabeth.goldstein@shalomdc.org
301-230-7228

The Jewish Federation of Greater Washington
6101 Executive Blvd., Suite 100
North Bethesda, MD 20852
PHONE 301-230-7230 • FAX 301-230-7273
TTY 301-230-7260
EMAIL endowment@shalomdc.org
WEB www.shalomdc.org/endowment

Contributions to the United Jewish Endowment Fund are tax deductible to the full extent the law allows.

This material is not intended to provide professional or legal advice. Please consult your advisors for professional advice.