FOR THE YEAR ENDING DECEMBER 31, 2020

YEAR AT A GLANCE

TOTAL ASSETS
$1.4 BILLION

• **Donor Advised Funds** constitute the largest pool, representing nearly 50% of all assets. This popular charitable tool requires a $5,000 minimum gift to begin.

• **Endowment Funds** provide ongoing support to donors’ favorite causes, a specific field of interest, or The Foundation’s community grants and require a minimum of $25,000 to get started.

• **Family Support Organizations** create a permanent legacy of family philanthropy, carried forward between generations, and require a minimum of $2.5 million to start.

• **Agency Funds** are established by Jewish nonprofit agencies at The Foundation to manage their endowments and reserve funds.

All dollars in M are millions and in B are billions.
INVESTMENTS

The Foundation’s endowments and agency funds are invested in the Common Investment Pool, a diversified portfolio with a long-term strategy of growth and preservation of capital. The Strategic Return Fund provides a similar long-term investment option for Donor Advised Funds of $50,000 or more. Both portfolios are overseen by our Investment Committee, a group of our lay leaders who are seasoned professionals managing portfolios worth billions of dollars. The Investment Committee relies on investment managers specializing in specific asset classes and works with an independent investment consultant, Canterbury Consulting, to regularly analyze market conditions and monitor the portfolios’ performance and risk.

RATES OF RETURN (%)

as of 12/31/2020

<table>
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<th></th>
<th>1YR</th>
<th>3YR</th>
<th>5YR</th>
<th>7YR</th>
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<tr>
<td>CIP</td>
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<td>8.3</td>
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<td>14.5</td>
<td>8.5</td>
<td>9.2</td>
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*Inception, October 2013

COMMON INVESTMENT POOL

$476M

ALTERNATIVE INVESTMENTS

DOMESTIC EQUITY

33%

38%

INTERNATIONAL EQUITY

FIXED INCOME & CASH

25%

4%
More than half of all Foundation grants By Field of Interest supported Human Services. Jewish causes remain the core focus of Foundation grantmaking By Sector, with 70% of grants designated for local and national Jewish nonprofits in 2020. Note that nearly all of The Foundation’s institutional grantmaking in 2020 was directed to pandemic relief.

*Foundation Grants in 2020: COVID-19 Response Grants • Racial Equity Grants • Other Endowment Grants
Donor Grants By Field of Interest were distributed nearly evenly in five areas: Health, Science & Environment; Human Services; Arts, Culture & Civic Life; Religious Life; and Education. Donors recommended nearly half of all grants to the Jewish community locally and nationally, almost one-third to the community at large, and close to one-quarter to Israel.