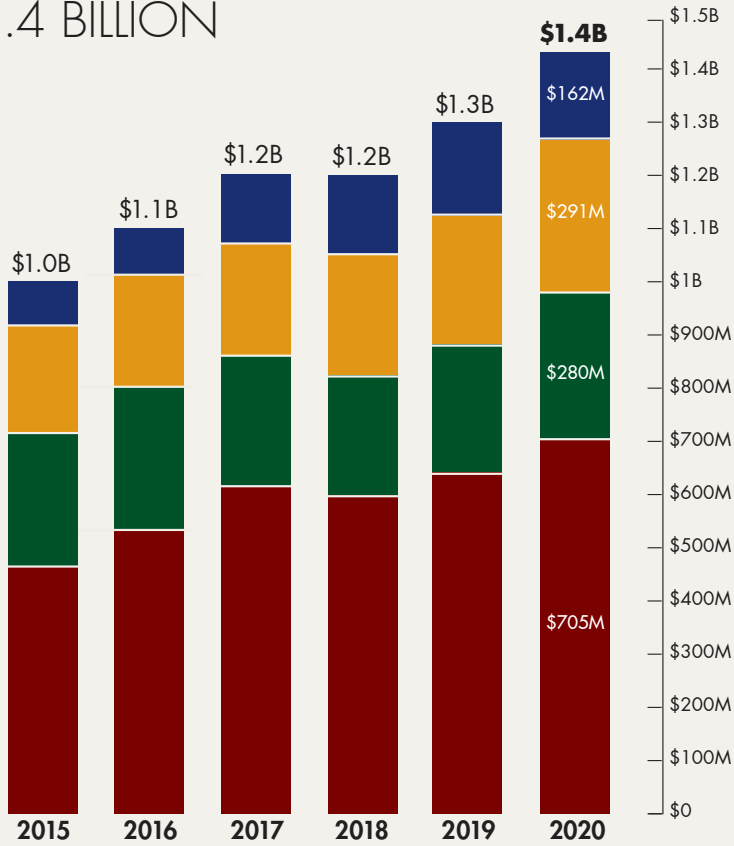


FOR THE YEAR ENDING DECEMBER 31, 2020

YEAR AT A GLANCE

TOTAL ASSETS

\$1.4 BILLION



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

■ Donor Advised Funds ■ Endowment Funds ■ Family Support Organizations ■ Agency Funds

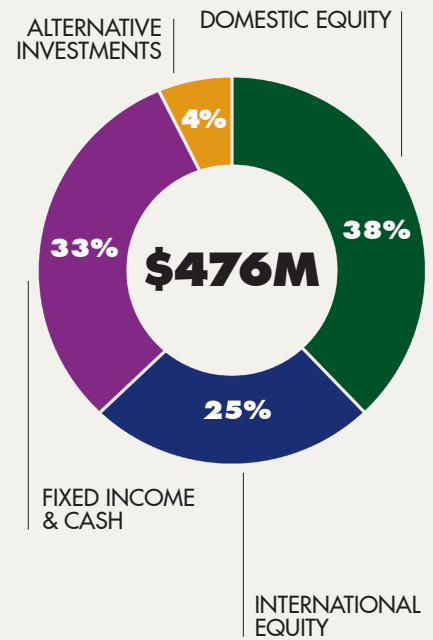
- **Donor Advised Funds** constitute the largest pool, representing nearly 50% of all assets. This popular charitable tool requires a \$5,000 minimum gift to begin.
- **Endowment Funds** provide ongoing support to donors' favorite causes, a specific field of interest, or The Foundation's community grants 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.

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.



COMMON INVESTMENT POOL



RATES OF RETURN (%)

as of 12/31/2020

	1YR	3YR	5YR	7YR	10YR
CIP	13.0	8.3	9.0	6.6	7.2
SRF*	14.5	8.5	9.2	6.2	

■ COMMON INVESTMENT POOL (CIP)

■ STRATEGIC RETURN FUND (SRF)

*Inception, October 2013

TOTAL GRANTS

\$116 MILLION

FOUNDATION GRANTS

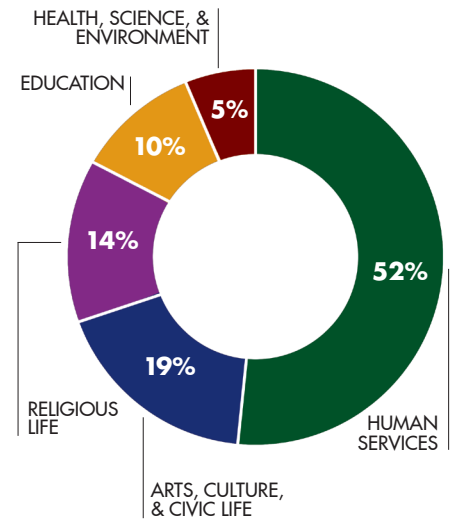
\$10 MILLION

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.

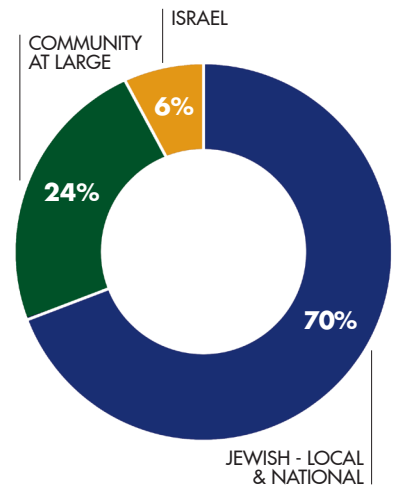
*Foundation Grants in 2020:
COVID-19 Response Grants • Racial Equity Grants • Other Endowment Grants



FOUNDATION GRANTS*
BY FIELD OF INTEREST



FOUNDATION GRANTS*
BY SECTOR



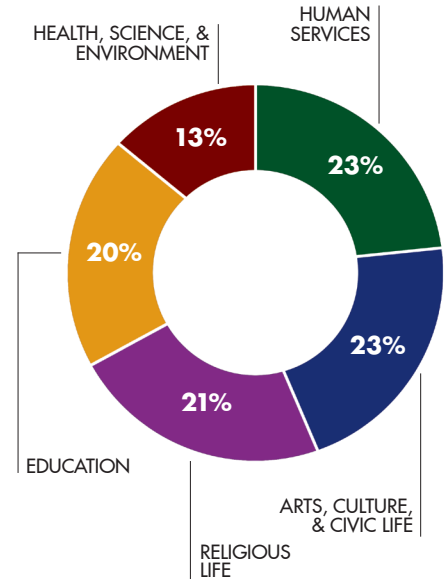
DONOR GRANTS

\$106 MILLION

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.



DONOR GRANTS BY FIELD OF INTEREST



DONOR GRANTS BY SECTOR

