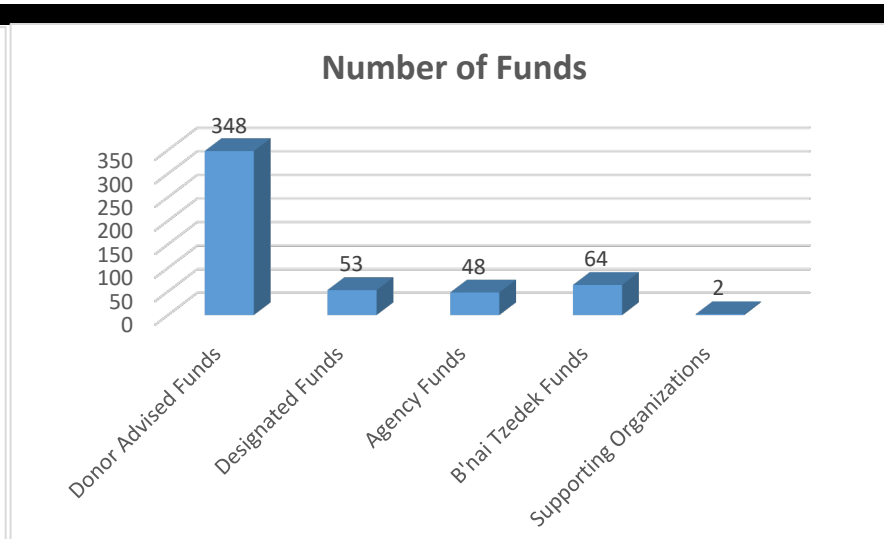
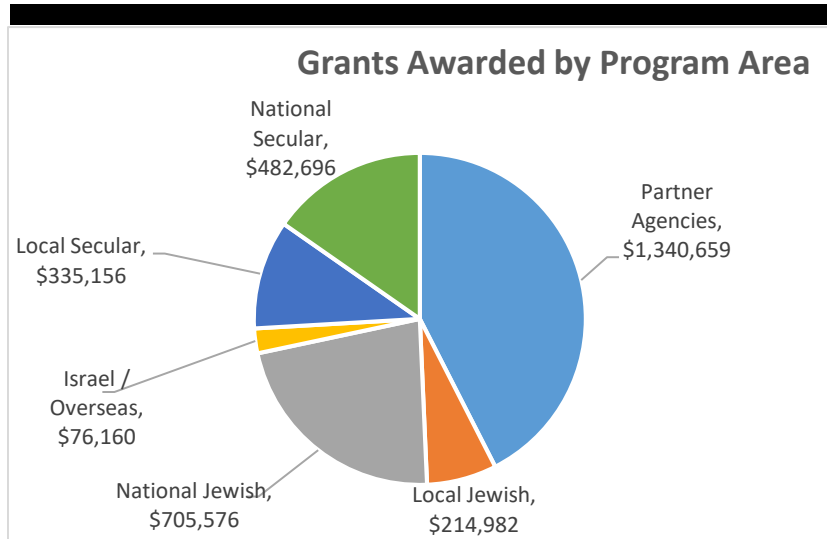


**JFOM Dashboard**  
**FY Activity July 2019 - November 2019**



	<b>Gifts</b>	<b>Value</b>	<b>Grants Awarded</b>	<b>Value</b>
Donor Advised Funds	\$3,185,239	\$ 24,329,341	Partner Agencies	\$1,340,659
Designated Funds	\$1,598,048	\$ 15,116,141	Local Jewish	\$214,982
Agency Funds	\$1,164,099	\$ 14,952,847	National Jewish	\$705,576
B'nai Tzedek Funds	\$3,200	\$ 223,450	Israel / Overseas	\$76,160
Supporting Organizations	\$90	\$ 38,969,326	Local Secular	\$335,156
			National Secular	\$482,696
<b>TOTAL</b>	<b>\$5,950,676</b>	<b>\$ 93,591,105</b>	<b>TOTAL</b>	<b>\$3,155,230</b>

<b>Number of Funds</b>		<b>Investment Returns:</b>	<b>YTD (Calendar as of 9/30/2019)</b>
Donor Advised Funds	348	JCEP	10.00%
Designated Funds	53	Short Term Bond Index 100% Fixed	4.47%
Agency Funds	48	LifeStrategy Income 20% Equity/80% Fixed	10.42%
B'nai Tzedek Funds	64	LifeStrategy Conservative Growth 40% Equity/60% Fixed	11.99%
Supporting Organizations	2	LifeStrategy Moderate Growth 60% Equity/40% Fixed	13.52%
		LifeStrategy Growth 80% Equity/20% Fixed	15.00%
<b>TOTAL</b>	<b>515</b>	Stock Market Index Fund 100% Equity	20.00%
		Israel ETF - ISRA	17.10%



**Jewish Community Partners, Inc.**  
**Summary of Investment Returns and Fund Balances**  
**September 30, 2019**

	<u>Month</u>	<u>Year- to-date</u>	<u>1 year</u>	<u>3 year</u>	<u>5 year</u>	<u>10 year</u>	<u>Fund Balances</u>
<b>Memphis Jewish Federation Endowment Funds</b>							
Jewish Community Endowment Pool (JCEP) (56.50%)	0.70%	10.00%	2.60%	6.00%	4.30%	6.00%	7,669,458.96
Vanguard Institutional Advisory Services (VIAS) (43.50%)	1.25%	12.17%	3.28%	n/a	n/a	n/a	7,811,755.20
<b>Total Memphis Jewish Federation Endowment Funds</b>							<b>15,481,214.16</b>
<b>Jewish Foundation of Memphis Endowment Funds</b>							
Jewish Community Endowment Pool (JCEP)	0.70%	10.00%	2.60%	6.00%	4.30%	6.00%	734,954.94
Vanguard Institutional Advisory Services (VIAS)	1.23%	12.33%	3.27%	n/a	n/a	n/a	746,879.91
Israel Investment ETF - ISRA	0.21%	17.10%	-0.25%	6.95%	2.75%	n/a	48,614.63
Money Market Funds	<i>Average earnings approximately 1.96%</i>						61,898.63
<b>Total Jewish Foundation of Memphis Endowment Funds</b>							<b>1,592,348.11</b>
<b>Jewish Foundation of Memphis Agency, DAF, Designated &amp; Family Foundations:</b>							
Jewish Community Endowment Pool (JCEP)	0.70%	10.00%	2.60%	6.00%	4.30%	6.00%	20,310,960.28
Vanguard Institutional Advisory Services (VIAS)	1.23%	12.33%	3.27%	n/a	n/a	n/a	1,595,988.81
Short Term Bond Index 100% Fixed (VBIRX)	-0.10%	4.47%	5.98%	1.94%	1.94%	2.02%	381,744.99
LifeStrategy Income 20% Equity/80% Fixed (VASIX)	-0.04%	10.42%	8.89%	4.66%	4.57%	5.17%	606,264.46
LifeStrategy Conservative Growth 40% Equity/60% Fixed (VSCGX)	0.51%	11.99%	7.04%	6.07%	5.43%	6.53%	2,500,969.27
LifeStrategy Moderate Growth 60% Equity/40% Fixed (VSMGX)	1.05%	13.52%	5.09%	7.44%	6.23%	7.88%	15,295,478.11
LifeStrategy Growth 80% Equity/20% Fixed (VASGX)	1.57%	15.00%	3.10%	8.75%	6.93%	9.05%	5,857,556.07
Stock Market Index Fund 100% Equity (VTSAX)	1.70%	20.00%	2.88%	12.81%	10.42%	13.09%	4,470,967.08
Israel Investment ETF - ISRA	0.21%	17.10%	-0.25%	6.95%	2.75%	n/a	7,048.61
Money Market Funds	<i>Average earnings approximately 1.96%</i>						3,638,593.87
<b>Total Jewish Foundation of Memphis Investment Options:</b>							<b>54,665,571.55</b>

	<b>2019</b>	<b>9/30/2019</b>	<b>YTD</b>
GIFTS		2,128,453.44	5,762,854.44
GRANTS		-882,227.09	-5,024,784.48
NET		1,246,226.35	738,069.96

Support Organizations	2 funds
Donor Advised Funds	343 funds
Designated Funds	53 funds
B'nai Tzedek Funds	62 funds
Custodial Funds	46 funds

<b>S&amp;P 500</b>	<b>1.90%</b>	<b>20.60%</b>	<b>4.30%</b>	<b>13.40%</b>	<b>10.80%</b>	<b>13.20%</b>
<i>36% CRSP US Total Market Index, 28% Barclays U.S. Aggregate Float Adjusted Index, 24% FTSE Global All Cap ex US Index, and 12% Barclays Global Aggregate ex-USD Float Adjusted RIC Capped Index as of July 1, 2015</i>	1.03%	13.66%	5.25%	7.64%	6.40%	8.12%
<i>Barclays U.S. 1-5 Year Government/Credit Float-Adj Spliced Idx</i>	-0.17%	4.48%	6.01%	2.01%	2.01%	2.12%
<b>Outside Manager:</b> Edward Jones						2,617,277.92

**TOTAL \$74,356,411.74**

## JEWISH FOUNDATION OF MEMPHIS AGENCY NEEDS LIST



**\$175** – Handheld pool vacuum and attachments for cleaning the ASBEE Mikvah  
**\$1,000**– Purchase and installation of RING security doorbell to provide access control during daily services  
**\$1,500**– Two Desktop PCs for Executive Director and Volunteer’s Work Stations – Replacements for Outdated and SLOW Computers



**\$3,000** – Transportation and expenses for one Yeshiva University Fellows Visit  
**\$4,000** – Installing lucite liners on sanctuary bookshelves.  
**\$6,000** – New internal high-quality sound system and microphones  
**\$10,000** – Permanent sealing and repairs to skylight in tabernacle.  
**\$12,000** – Repairs to major holes in pavement in our driveway and parking lots.



**\$3,000** –Creation of Youth Lounge for post-B’nai Mitzvah kids **FUNDED**  
**\$5,000** – Replacing/updating old thermostats  
**\$6,000** – Upgrading computers to operate on current standard software  
**\$7,500** – Upgrade phone and voicemail system  
**\$15,000** – Repairs to a leaking wall in the roof



**\$900** – Warming Cabinet for school lunches  
**\$2500** – 2- School zone blinking signs **FUNDED**  
**\$2500**- Risers for school performances  
**\$4,000** – Wifi routers and wiring  
**\$5,000** – Repaint rusted security fence



**\$170** – PJ Library tablecloth  
**\$1,000** – Teen Professionals Council to have first cross-community teens activity  
**\$1,275** – Automated External Defibrillator with everything we need to set-up AED station. **FUNDED**  
**\$15,000**– anti-bias/diversity training for Tennessee judges and judicial system staff to be held at upcoming TN state judicial conferences

## JEWISH FOUNDATION OF MEMPHIS AGENCY NEEDS LIST



- \$1,500** - Upgrade to smart thermostats to increase energy efficiency.
- \$3500**- Install security gate in Beit Midrash for increased protection of valuable Judaica
- \$5000**- Replace worn fascia board around exterior of the school
- \$7,500**- Install privacy shades on exterior windows to reduce unwanted visibility into classrooms
- \$10,000** - Renovate outdated breezeway to increase security and avoid further weather damage



- \$10 to \$100** – Purchase food for JFS Kosher Food Pantry
- \$1,340**– 100 Kosher Home-delivered Frozen Meals for home-bound Seniors



- \$2,500** - Moveable Basketball goals for growing JCC youth Basketball program - We are in need of 8 of these **1 FUNDED**
- \$4,000** – Athlete scholarships for JCCA Maccabi Games 2020
- \$9,500** - Additional security cameras in Early Childhood Center and the outside pavilion
- \$15,000** – New bleachers in the gym
- \$15,000** - program expenses related to our new summer camp inclusion program beginning in summer 2020, such as additional staff and sensory equipment and supplies
- \$15,000** - New Shade sail for ECC Toddler playground to protect children from sun (6 needed)



- \$259** – Inspection Camera Kit for visual access to hidden nooks and hard-to-see areas for maintenance **FUNDED**
- \$594** – Handheld food temperature tester with extra probe for kitchen (need 2 probes, one for meat and one for dairy) **FUNDED**
- \$2,760** - A year of Russian interpreter visits **FUNDED**
- \$5,592** - Digital clocks with cell phone chargers for patient and resident rooms – (160 for \$34.95 each)
- \$10,000** – New website design



### TEMPLE ISRAEL

- \$500/per student** – Wendy & Avron Fogelman Religious School Scholarships for Jewish educational and travel experiences
- \$5,000/per student** – Barbara K. Lipman Early Learning Center scholarships
- \$50,000** – Security Notification System

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