



JEWISH

JEWISH COMMUNITY FOUNDATION OF SAN DIEGO'S IMPACT INVESTMENT PORTFOLIO

Jewish Community Foundations exist in many cities and regions in North America to enable philanthropic giving. Over the past 50 years, the Jewish Community Foundation of San Diego ("JCFSD") has facilitated over \$1 billion through more than 60,000 grants to 5,000 nonprofits. JCFSD oversees the investment of more than \$330 million on behalf of nearly 800 donors who have established donor-advised funds as well as nearly 50 organizations who have entrusted their reserves and endowments with the Foundation.

Recently, JCFSD added an impact investment option for donors. The impact investment portfolio seeks both financial return and positive impact aligned with the organization's Jewish values: tzedakah (justice), dor l'dor (generation to generation), kavod (respect), Torah (learning), and derekh erez (daily interpersonal ethics). The portfolio is diversified across all asset classes and attempts to utilize a number of strategies including screens, ESG (environmental, social, governance) incorporation, shareholder engagement, community development, and thematic private impact investments. The portfolio's impact priorities include: (1) social concerns, (2) environmental concerns, and (3) place-based opportunities in San Diego and Israel.

JCFSD's impact investment portfolio aligns well with the SDGs. Examples include an emphasis on affordable housing, healthcare, clean energy, education, and sustainability.