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These efforts, combined with FCJC’s philanthropic expertise, will assist our community to build endowments to serve the future needs of our community.

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Gale Osborne

Advancement Director, Charlotte Jewish Day School

FCJC’s Create Your Jewish Legacy

FCJC’s Create Your Jewish Legacy (CYJL) is a community-wide effort designed to build endowments through legacy giving. Since its inception in 2012, the CYL initiative has resulted in over 945 legacy gift commitments from 400 individuals and families with an estimated future value of $840 million. We share our planned giving expertise with our local Jewish organizations to assist them in their development efforts. This includes the identifying, educating and stewarding of their current and prospective legacy donors.

FCJC is honored to be part of the Harold Grinspoon Foundation’s Life and Legacy Initiative. To date, 72 communities are participating in this initiative and over 26,000 individuals and families have made legacy commitments with an estimated future value of over $1.3 billion. To review a complete list of Charlotte’s legacy donors, visit: www.charlottebookoflife.org/index_names.php

To learn more about how you can create your own Jewish legacy, contact Abby Kleber at 704-973-4544 or akleber@charlottejewishfoundation.org.

Inspiring Philanthropy and Building Community

Over the past year, FCJC has developed a strategic framework with a focus on inspiring philanthropy and building community. This will require an internal focus to maintain a financially strong FCJC, and an external focus of collaboration with our local Jewish agencies and the individuals and families whom we serve.

To accomplish this we will:

- Create and Sustain Mutually Beneficial Partnerships with Local Jewish Organizations
  - Develop Strong and Trusting Relationships
  - Facilitate Philanthropic Planning with Individuals and Families
  - Inform and Educate about giving opportunities to match funders with community needs
- Strengthen FCJC’s Financial Base and Governance
  - Build and promote the FCJC brand
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**FCJC’s Create Your Jewish Legacy**

**CYJL COMMUNITY PARTNERS:**

**Strengthen FCJC’s Financial Base and Governance**

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About FCJC

The Foundation for the Charlotte Jewish Community was created in 1997 to facilitate charitable planning, build and distribute endowment assets and support lifetime and legacy giving. As a supporting organization of Foundation For The Carolinas, the 5th largest community foundation in the country, FCJC is uniquely positioned to support the philanthropic needs of Charlotte’s Jewish community. Our Board maintains its own independent operating budget that supports FCJC’s efforts to build and sustain the community.

FCJC collaboratively partners with individual donors and more than 25 Jewish organizations. FCJC-managed funds support both Jewish and secular causes in the Charlotte region and beyond. To review a complete list of organizations supported by these funds, visit www.charlottejewishfoundation.org.

Financial Highlights

Statement of Activities for Year Ended December 31, 2022

<table>
<thead>
<tr>
<th>Revenues</th>
<th>$ 9,054,474</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$ 9,054,474</td>
</tr>
<tr>
<td>Net Investment Income and Gains (Loss)</td>
<td>$ (29,507,610)</td>
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<tr>
<td>Fee Income</td>
<td>$ 761,769</td>
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<tr>
<td>Total Revenue</td>
<td>$ (19,691,367)</td>
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<table>
<thead>
<tr>
<th>Grants and Expenses</th>
<th>$ 10,422,386</th>
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<tbody>
<tr>
<td>Grants to Charitable Organizations</td>
<td>$ 10,422,386</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>$ 308,357</td>
</tr>
<tr>
<td>Other Expenses**</td>
<td>$ 1,097,610</td>
</tr>
<tr>
<td>Total Grants and Expenses</td>
<td>$ 11,838,353</td>
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<tr>
<td>Change in Net Assets</td>
<td>$ (31,529,720)</td>
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<tr>
<td>Net Assets, Beginning of Year</td>
<td>$ 207,920,528</td>
</tr>
<tr>
<td>Net Assets, End of Year</td>
<td>$ 176,390,808</td>
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</tbody>
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*Includes income, realized and unrealized gains/losses
**Includes administrative fees charged and pass-through fund expenses

FCJC Assets Under Management (12/31/14 THROUGH 12/31/22)

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<td>$ 225m</td>
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Annual Gifts and Grants FCJC Managed Funds

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FCJC Annual Fee Revenue

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Annual Grant Distributions from FCJC Funds to Local Jewish Organizations

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Officers & Staff

Stephen Philipson, Chair
Ira Stolinka, Vice Chair
David Cantor, Treasurer
Holly Levinson, Secretary
Fred Ounses, Immediate Past Chair
Phil Warshauer, Executive Director
Abby Kleber, Asst. Vice President Stewardship & Legacy Giving

Foundation for the Charlotte Jewish Community

2022-23 Board of Trustees

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David Cantor
Temple Beth El
Glenda Bernhardt
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Fred Ounses
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Sarah Ross
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Harry Sparks
Debra Van Glish
Emily Zimmern
Fred Dumas
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Foundation of Shalom Park
Eilo Kososky
Phil Kerman
Hebrew Cemetery Association
Holly Levinson
Charlotte Jewish Day School
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Temple Israel
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Jewish Federation
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Emily Zimmern
Fred Dumas
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Eilo Kososky
Phil Kerman
Hebrew Cemetery Association
Holly Levinson
Charlotte Jewish Day School
About FCJC

The Foundation for the Charlotte Jewish Community was created in 1997 to facilitate charitable planning, build and distribute endowment assets and support lifetime and legacy giving. As a supporting organization of Foundation For The Carolinas, the 5th largest community foundation in the country, FCJC is uniquely positioned to support the philanthropic needs of Charlotte’s Jewish community. Our Board maintains its own independent operating budget that supports FCJC’s efforts to build and sustain the community.

FCJC collaboratively partners with individual donors and more than 25 Jewish organizations. FCJC-managed funds support both Jewish and secular causes in the Charlotte region and beyond. To review a complete list of organizations supported by these funds, visit www.charlottejewishfoundation.org.

Foundation for the Charlotte Jewish Community

2022-23 Board of Trustees

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David Cantor, Treasurer
Holly Levinson, Secretary
Fred Dumas, Immediate Past Chair

FCJC Annual Fee Revenue


$ 800k $ 600k $ 400k $ 200k $ 100k $ 800k $ 1200k $ 177.3m $ 179.8m $ 118.8m $ 136.3m $ 114.2m $ 141.8m $ 124.1m $ 159.3m $ 211.3m

FCJC Managed Funds


$ 225m $ 200m $ 175m $ 150m $ 125m $ 100m $ 75m $ 50m $ 25m $ 177.3m $ 179.8m $ 118.8m $ 136.3m $ 114.2m $ 141.8m $ 124.1m $ 159.3m $ 211.3m

Annual Grant Distributions from FCJC Funds to Local Jewish Organizations


$ 3m $ 2m $ 1m $ 1.9m $ 2.6m $ 2.8m $ 3.2m $ 14.4m $ 9.1m $ 10.4m $ 8.8m $ 9.1m $ 10.7m $ 14.0m $ 22.4m $ 744k $ 762k

Financial Highlights

Statement of Activities for Year Ended December 31, 2022

Revenues

Contributions $ 9,054,474
Net Investment Income and Gains (Losses)* $(29,507,610)
Network Income $ 761,769
Total Revenue $ (19,691,367)

Grants and Expenses

Grants to Charitable Organizations $ 10,422,286
Operating Expenses 308,357
Other Expenses** 1,097,610
Total Grants and Expenses $ 11,838,353
Net Assets, Beginning of Year 207,920,528
Change in Net Assets $ (31,529,720)
Net Assets, End of Year 176,390,808

*Includes income, realized and unrealized gains/losses
**Includes administrative fees charged and pass-through fund expenses

FCJC maintains its own independent operating budget based on fee revenue from FCJC funds that supports our efforts to build and sustain the community.

ANNUAL REPORT

2022