FEG MEMORANDUM

TO:	**Richmond Jewish Foundation**
FROM:	**FEG**
SUBJECT:	**Agenda – Investment Committee Meeting** [v1.1]
DATE:	**Thursday, July 16, 2026, 12:00 p.m. (Eastern)**

Attendance Options

- **Option 1, onsite:**
  - **5540 Falmouth Street, Suite 201**
  - **Richmond, Virginia 23230**
- **Option 2, remote:**
  - **Zoom: https://us02web.zoom.us/j/88039762077?pwd=43A221oWyc5d66WdeqEwitok4RG0PE.1**
  - **Meeting ID: 880 3976 2077**
  - **Passcode: 660140**

11:45 a.m. Lunch (sponsored by FEG)

12:00 p.m. Meeting begins

1. Action – Approve minutes (provided by RJF)
2. Inform – New member introductions (if needed)
3. Inform – Foundation update, including cash flow (facilitated by RJF)
4. Discuss – Portfolio update
   - Recent changes (if any)
   - Capital markets outlook
   - Performance, attribution, and market commentary
   - Positioning
5. Discuss – *Work Plan*: "deep dive" real assets
6. Discuss – *Work Plan*: review IPS
7. Education, "*Party Like It's…AI, Earnings, and the Case for Moderation*" (time permitting)
8. Inform – Next meeting(s) / topic(s)
   - Thursday, 07/16/26
   - Thursday, 10/15/26
   - Thursday, 01/14/27
   - Thursday, 04/15/27