



Gifts to Endowment

SOUND INVESTMENTS IN THE FUTURE

Southwestern University endowments are a sound investment in a better future. With a gift to endowment, you provide permanent support for the University. All endowment principal is invested and each year a portion of the earnings is used to support the University and the purposes specified by donors.

For the past three years the average payout rate of endowed earnings has been approximately five percent of the value of the endowment. This means that a \$1 million endowment may pay out as much as \$50,000 a year. Earnings in excess of the payout are returned to the endowment to preserve its purchasing power against inflation, providing a cushion for periods of poor market performance and allowing for modest growth over time.

Growing the endowment is the best way to guarantee Southwestern's long-term financial health, sustain its academic excellence, and honor its commitment to providing access and affordability to admitted students through need-based financial aid.

NAME YOUR GIFT

Choosing what your endowment will support is simply a matter of selecting a program that matches your interests. Southwestern's endowments support our faculty, provide financial aid for our students, build our libraries and collections, and sustain a myriad of programs and activities. Minimum requirements for establishing an endowment vary depending on the nature of the gift opportunity.

You may fund an endowment through a single gift, or through multiple gifts spread over a period of up to five years, and you or anyone else may continue to add to its principal at any time. Moreover, by selecting the title of your endowment, you can forever link your name—or that of a family member, friend or organization—to scholarly excellence at Southwestern.



TYPES OF ENDOWMENTS

Endowments allow Southwestern to preserve its signature strengths, fund current priorities, and achieve future goals. A larger endowment will also minimize tuition increases while helping Southwestern to attract—and keep—the very best faculty and students. The following are a variety of endowment types that may also cover purposes that fall outside of the general categories listed below.

- ▶ Endowed scholarship funds and fellowships enable Southwestern to attract and recognize the best students, regardless of their financial circumstances. An endowed scholarship fund becomes active (begins generating distributions) in the academic year after the total gifts received to the fund exceed \$25,000 on June 30. The endowed fund may become active through a single contribution of \$25,000+ or by pledging a series of payments totaling \$25,000 or more.
- ▶ Program Endowments and Excellence Funds support excellence in specific or general programs across campus. These endowments become active in the academic year after the total gifts received to the fund exceed \$25,000 on June 30.

- ▶ Book and Collection Funds advance scholarship and research at Southwestern. These endowments become active in the academic year after the total gifts received to the fund exceed \$10,000 on June 30.
- ▶ Chairs and Professorships are awarded to outstanding faculty, and are crucial in the recruitment and retention of highly qualified teachers and researchers. Endowments for faculty scholarship support the research and creative works of the faculty. These endowments become active in the academic year after the total gifts received to the fund exceed a figure between \$100,000 and \$1.5 million (depending on the specific Chair or Professorship) on June 30.

For more information, please call 512-863-1211, email susan.stubbs@southwestern.edu, or visit www.southwestern.edu/giving