Policy Summary

The goal of the endowment investment program is to provide a real total return from assets invested that will preserve the purchasing power of the endowment assets, while generating an income stream to support the activities of the University.

Full Policy Text

Endowment funds are gifts from donors subject to restrictions that the principal be invested in perpetuity and the income generated therefrom be expended for current operations in accordance with donor restrictions. The goal of the endowment investment program is to provide a real total return from assets invested that will preserve the purchasing power of the endowment assets, while generating an income stream to support the activities of the University. The endowment investment objectives are:

1. Protect the principal of the funds against permanent loss
2. Generate sufficient investment return to provide sustainable funding for current operating needs
3. Grow the principal to protect the endowment from inflation

Administration of Policy

Mandating Authority:
Board of Regents Business Procedures Manual

Responsible Office(s):
Comptroller's Office, 400B Sparks Hall, 3-3070

Responsible Executive(s):

Policy History

Approving Body: Board of Regents

Rationale or Purpose

None given.

Additional Information
Additional Helpful Resources