

Guide to the Funds Management, Yale University, Gift Annuity Records

RU 1100



compiled by Daniel Hartwig

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Collection Overview

REPOSITORY: Manuscripts and Archives
Yale University Library
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CALL NUMBER: RU 1100

CREATOR: Yale University. Funds Management

TITLE: Funds Management, Yale University, gift annuity records

DATES: circa 1880-2008

PHYSICAL DESCRIPTION: 7 linear feet (7 boxes)

LANGUAGE: English

SUMMARY: The records consist of gift annuity statements maintained by Funds Management.

ONLINE FINDING AID: To cite or bookmark this finding aid, please use the following link: <https://hdl.handle.net/10079/fa/mssa.ru.1100>

Requesting Instructions

To request items from this collection for use in the Manuscripts and Archives reading room, please use the request links in the HTML version of this finding aid, available at <https://hdl.handle.net/10079/fa/mssa.ru.1100>.

To order reproductions from this collection, please go to http://www.library.yale.edu/mssa/ifr_copy_order.html. The information you will need to submit an order includes: the collection call number, collection title, series or accession number, box number, and folder number or name.

Administrative Information

Immediate Source of Acquisition

The materials were transferred from Treasury Services, 2009.

Conditions Governing Access

Access to the records is restricted. See Collection Contents for details.

Some records in this finding aid have been redacted, as they include student names, donor names, and other restricted data. These records will not appear in the published finding aid.

Conditions Governing Use

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Preferred Citation

Funds Management, Yale University, Gift Annuity Records (RU 1100). Manuscripts and Archives, Yale University Library.

Processing Information

Yale University records are arranged and described at the accession level by the creating office. The University Archives creates collection level descriptive records, but typically does no further arrangement and description at the accession level.

Biographical / Historical

Funds Management is responsible for administering the University's restricted funds. This includes: establishing new funds, endowments, student loans, expendable gifts and building funds; providing stewardship for all restricted funds; preparing annual financial reports for donors; assisting in the placement of gifts in proper accounts; managing the fiduciary responsibility for the University's gift annuities and life income funds; budgeting and distributing endowment income each year and budgeting and monitoring unrestricted and restricted gifts to the operating budget.

Scope and Contents

The records consist of gift annuity statements maintained by Funds Management.

General note

Forms part of Yale Record Group 5-C (YRG 5-C), Budget records of Yale University.

Arrangement

The records are arranged alphabetically by donor name.

Collection Contents

Accession 2009-A-180: Gift annuity records, circa 1880-2008

8 linear feet

Restricted to office of origin only.

Selected Search Terms

The following terms have been used to index the description of this collection in the Library's online catalog. They are grouped by name of person or organization, by subject or location, and by occupation and listed alphabetically therein.

Subjects

Universities and colleges -- Administration
Universities and colleges -- Finance

Corporate Bodies

Yale University. Funds Management
Yale University -- Administration
Yale University -- Finance