

Guide to the Assistant Comptroller for Estates, Trusts and Taxes, Yale University, Records

RU 544



compiled by Daniel Hartwig

April 2008

Yale University Library
P.O. Box 208240
New Haven, CT 06520-8240
(203) 432-1735
(203) 432-7441

beinecke.library@yale.edu

<http://www.library.yale.edu/mssa/>

Table of Contents

Collection Overview	3
Requesting Instructions	3
Administrative Information	3
Conditions Governing Access	3
Preferred Citation	4
Scope and Contents	4
General note	4
Arrangement	4
Collection Contents	5
Accession 1979-A-021: Records concerning the estates of Olivia C. Hotchkiss and George E. Day, 1905-1909	5
Accession 1983-A-079: Tax returns, 1974-1982	6
Accession 1983-A-116: Materials transferred out of previous audit accessions, circa 1946-1980	7
Accession 1985-A-037: Records, 1971-1984	8
Accession 1985-A-038: Wills, 1891-1962	9
Accession 1985-A-039: Records, 1980-1983	10
Accession 1986-A-095: Tax forms, 1976-1984	11
Accession 1988-A-033: Records, 1972-1986	12
Accession 1988-A-036: Records, 1720-1977	13
Accession 1988-A-048: Estate records, 1930-1983 (bulk 1973-1983)	14
Accession 1988-A-093: Records, 1966-1987	15
Accession 1989-A-109: Records, 1972-1987	16
Accession 2009-A-097: Tax Department records, 2001-2007	17
Selected Search Terms	19

Collection Overview

REPOSITORY: Manuscripts and Archives
Yale University Library
P.O. Box 208240
New Haven, CT 06520-8240
(203) 432-1735
(203) 432-7441
beinecke.library@yale.edu
<http://www.library.yale.edu/mssa/>

CALL NUMBER: RU 544

CREATOR: Yale University. Office of Finance and Administration

TITLE: Assistant comptroller for estates, trusts and taxes, Yale University, records

DATES: 1740-2007

PHYSICAL DESCRIPTION: 57.5 linear feet

LANGUAGE: English

SUMMARY: The records consist of reports, subject files, agreements, tax and audit files, financial statements, and memoranda documenting the operations of the assistant comptroller for estates, trusts and taxes at Yale.

ONLINE FINDING AID: To cite or bookmark this finding aid, please use the following link: <https://hdl.handle.net/10079/fa/mssa.ru.0544>

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.0544>.

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.

Key to the container abbreviations used in the PDF finding aid:

b. box
f. folder

Administrative Information

Conditions Governing Access

Access to the records is restricted to the office of origin only.

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.

Preferred Citation

Assistant Comptroller for Estates, Trusts and Taxes, Yale University, Records (RU 544). Manuscripts and Archives, Yale University Library.

Scope and Contents

The records consist of reports, subject files, agreements, tax and audit files, financial statements, and memoranda documenting the operations of the assistant comptroller for estates, trusts and taxes at Yale.

General note

Forms part of Yale Record Group 5-B (YRG 5-B), Accounting records and records of the Yale comptroller.

Arrangement

The collection is arranged by accession.

Collection Contents

Accession 1979-A-021: Records concerning the estates of Olivia C. Hotchkiss and George E. Day, 1905-1909

Restricted to office of origin only

Accession 1983-A-079: Tax returns, 1974-1982

Restricted to office of origin only

Accession 1983-A-116: Materials transferred
out of previous audit accessions

Assistant comptroller for estates, trusts and taxes, Yale University,
records
RU 544

**Accession 1983-A-116: Materials transferred out of previous audit accessions, circa
1946-1980**

Restricted to office of origin only

Yale University

Accession 1985-A-037: Records, 1971-1984

Restricted to office of origin only

b. 1, f. 4

Yale University Information Return - Form 990

1982-1983

Accession 1985-A-038: Wills, 1891-1962

Restricted to office of origin only

Accession 1985-A-039: Records, 1980-1983

Restricted to office of origin only

Accession 1986-A-095: Tax forms, 1976-1984

Restricted to office of origin only

Accession 1988-A-033: Records, 1972-1986

Restricted to office of origin only

Accession 1988-A-036: Records, 1720-1977

Restricted to office of origin only

Accession 1988-A-048: Estate records, 1930-1983 (bulk 1973-1983)

Restricted to office of origin only

Accession 1988-A-093: Records, 1966-1987

Restricted to office of origin only

Accession 1989-A-109: Records, 1972-1987

Restricted to office of origin only

Accession 2009-A-097: Tax Department records, 2001-2007

Restricted until Jan 1, 2043

b. 2, f. 16	Drama Productions, Inc.	
b. 4, f. 51	Yale Southern Observatory, Inc.	
b. 4, f. 52	Yale Alumni Publications, Inc.	
b. 6, f. 63	Yale University - State of Arizona	
b. 6, f. 64	Yale University - State of California	
b. 6, f. 65	Yale University - State of Colorado	
b. 6, f. 66	Yale University - State of Connecticut	
b. 6, f. 67	Yale University - State of Illinois	
b. 6, f. 68	Yale University - State of Indiana	
b. 6, f. 69	Yale University - State of New Jersey	
b. 6, f. 70	Yale University - State of Louisiana	
b. 6, f. 71	Yale University - State of Maine	
b. 6, f. 72	Yale University - State of Maryland	
b. 6, f. 73	Yale University - State of Minnesota	
b. 6, f. 74	Yale University - State of Missouri	
b. 6, f. 75	Yale University - State of Nevada	
b. 6, f. 76	Yale University - State of New Mexico	
b. 6, f. 77	Yale University - State of New York	
b. 6, f. 78	Yale University - State of North Carolina	
b. 6, f. 79	Yale University - State of Pennsylvania	
b. 6, f. 80	Yale University - State of South Carolina	
b. 6, f. 81	Yale University - State of Texas	
b. 6, f. 82	Yale University - Various States	
b. 6, f. 83	Yale University - State of Virginia	
b. 6, f. 84	Yale University - State of Wisconsin	
b. 7, f. 85	Yale University 2004 Form 990-T - 1 of 2	FYE 6/30/05
b. 7, f. 86	Yale University 2004 Form 990-T - 2 of 2	FYE 6/30/05
b. 7, f. 87	Yale University 2005 Form 990-T - 1 of 2	FYE 6/30/06

b. 7, f. 88	Yale University 2005 Form 990-T - 2 of 2	FYE 6/30/05
b. 7, f. 89	Yale University 2006 Form 990-T - 1 of 2	FYE 6/30/07
b. 7, f. 90	Yale University 2006 Form 990-T - 2 of 2	FYE 6/30/07

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 -- Finance

Corporate Bodies

Yale University. Office of Finance and Administration

Yale University -- Administration

Yale University -- Benefactors

Yale University -- Finance