

ENDOWMENT SERVICES & GIFT COMPLIANCE

Jamie Cantara, Executive Director
Endowment Services & Gift Compliance/Finance

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INTRODUCTION

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UT Austin Endowment Services, Gift Compliance and Namings

Jamie Cantara, *Executive Director of Endowments*

Brian Willey, *Senior Director, Gift Agreements and Namings*

Amanda Schwartz, *Director, Cy Pres Coordinator, Endowment Creation*

Christie Schoenrock, *Director, Endowment Compliance, Endowment Creation*

Chandra McTyre, *Gift Agreements Specialist, Donor Amendments*

Jenny Chang, *Resource and Training Coordinator*

Sunny Chavez, *Endowment Creation*

Kim Wisner, *Endowment Creation*

Sara Scott, *Endowment Creation*

Annette Bennett, *Reporting Specialist and Endowment Creation*

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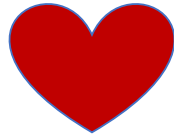
What we do:

- Review current purpose gift agreements of \$100,000 and higher
- Oversee and facilitate the naming process
 - 50-70 proposals a year
- Oversee and facilitate the endowment creation process
 - Around 300 new and 50 amended endowments annually
- Perform compliance on endowments
 - 8,570+ endowments – review 20% annually and other activities
- Deliver annual endowment principal account financial statements
 - 8,000 statements to 5,100 households (email or regular mail)
- Prepare specialized endowment reports, as required

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What we do:

At



Our purpose is to ensure that donor intent, as documented, is fulfilled.

Compliance begins when a potential donor and gift officer start discussing the philanthropic hopes, dreams and expectations held by the donor.

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ENDOWMENTS - BASICS

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Find the full text of this and thousands of other resources from leading experts in dozens of legal practice areas in the [UT Law CLE eLibrary \(utcle.org/elibrary\)](https://utcle.org/elibrary)

Title search: Endowment Services and Gift Compliance

First appeared as part of the conference materials for the
41st Annual Nonprofit Organizations Institute session
"MASTER CLASS: UPMIFA and Endowments"