

# ENDOWMENT SERVICES & GIFT COMPLIANCE

---

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

1

## INTRODUCTION

2

## 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*

3

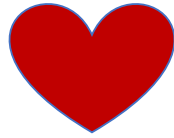
### What we do:

- 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

4

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.*

5

# ENDOWMENTS - BASICS

6

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  
41<sup>st</sup> Annual Nonprofit Organizations Institute session  
"MASTER CLASS: UPMIFA and Endowments"