

# BALANCING YOUR ENDOWMENTS FOR FUTURE SUCCESS

Strategic Financial Management for Schools and Colleges

## Is your school challenged by:

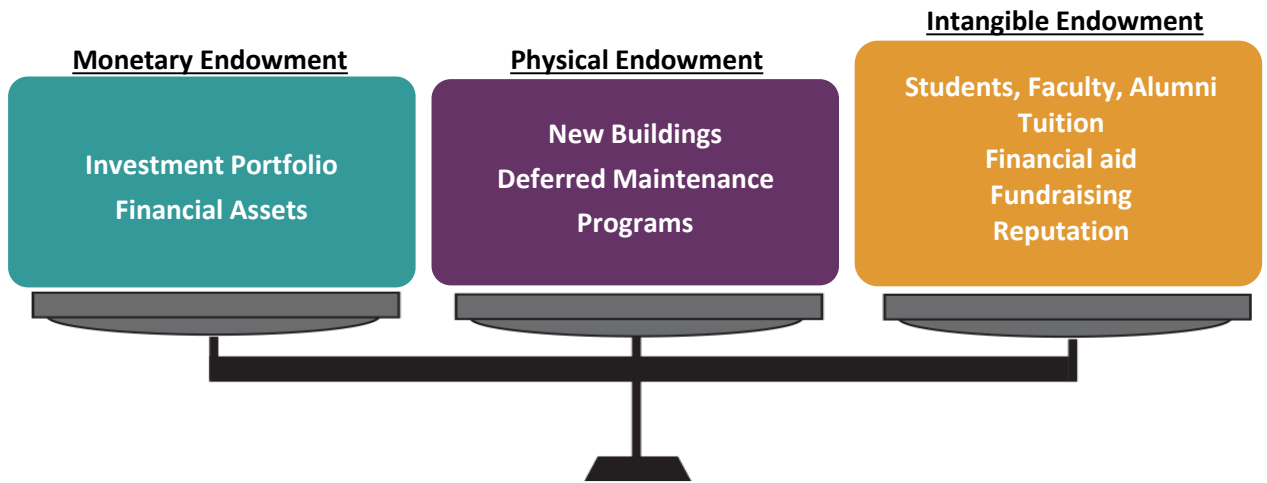
- Continually rising program expenses?
- Costs maintaining/updating plant and property?
- Keeping your competitive advantage?

## Our enhanced endowment financial management program

- Brings a fresh perspective on the definition of endowment assets
- Finds the optimal balance of programs, financial aid and philanthropy to support your operating and capital budgets
- Models a range of financial options with 'what if' scenarios
- Leverages institutional strengths to maximize the benefit to the institution

## Balancing the trade-offs

An effective, efficient, and sustainable balance of your resources



### Your trade-offs affect the balance

A few sample scenarios might include:

- Raise financial aid/lower tuition vs. reposition portfolio
- Raise tuition & fees vs increase endowment spending
- Defer maintenance vs add new programs

### DECISION MATRIX

Choose optimal scenario for achieving goals

### LONG TERM FINANCIAL STABILITY

### Decisions today preserve choices for tomorrow

- ✓ achieve informed and disciplined decision-making
  - ✓ assess budgetary viability (current, intermediate, long-term)
  - ✓ determine feasibility of current and future projects
  - ✓ evaluate financial opportunities and risks
  - ✓ design fine-tuned investment programs to meet your goals
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