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

Monetary Endowment
Investment Portfolio
Financial Assets

Physical Endowment
New Buildings
Deferred Maintenance
Programs

Intangible Endowment
Students, Faculty, Alumni
Tuition
Financial aid
Fundraising
Reputation

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

bellas@solarisgroupllc.com - (212) 582-4500
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

This material is for general information purposes only and is not intended to provide specific advice or a specific recommendation. Institutions who are interested in utilizing these strategies should consult with their own advisors regarding the appropriateness of employing any of the strategies described in his handout based on their particular circumstances.