



UWM Foundation Update

presented to the

UWM Faculty Senate



David Gilbert
President
UWM Foundation
May 7, 2020

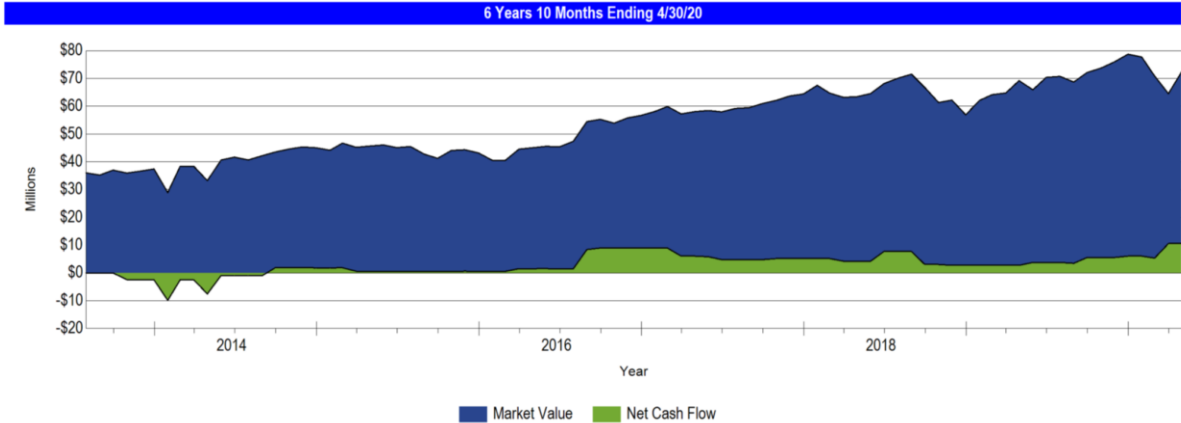


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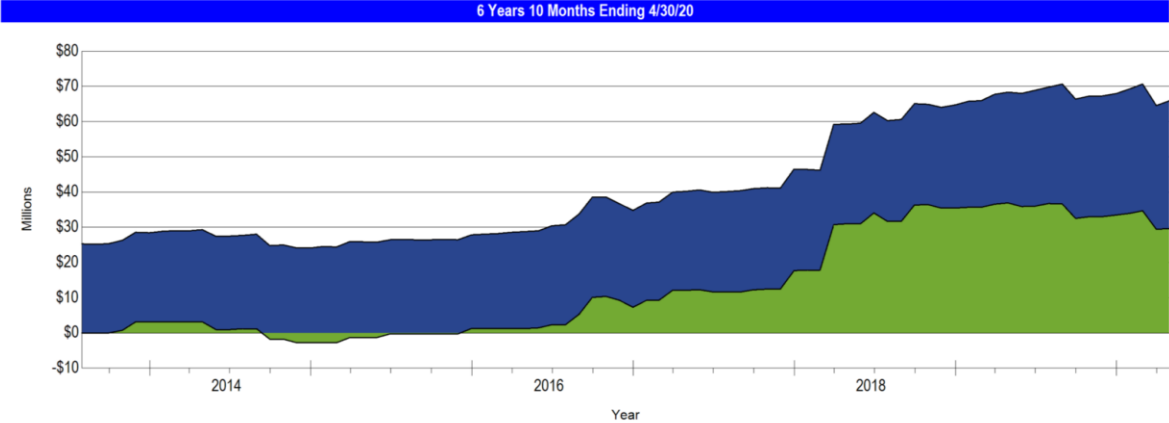


Market Value

Equity Pool



Fixed Pool

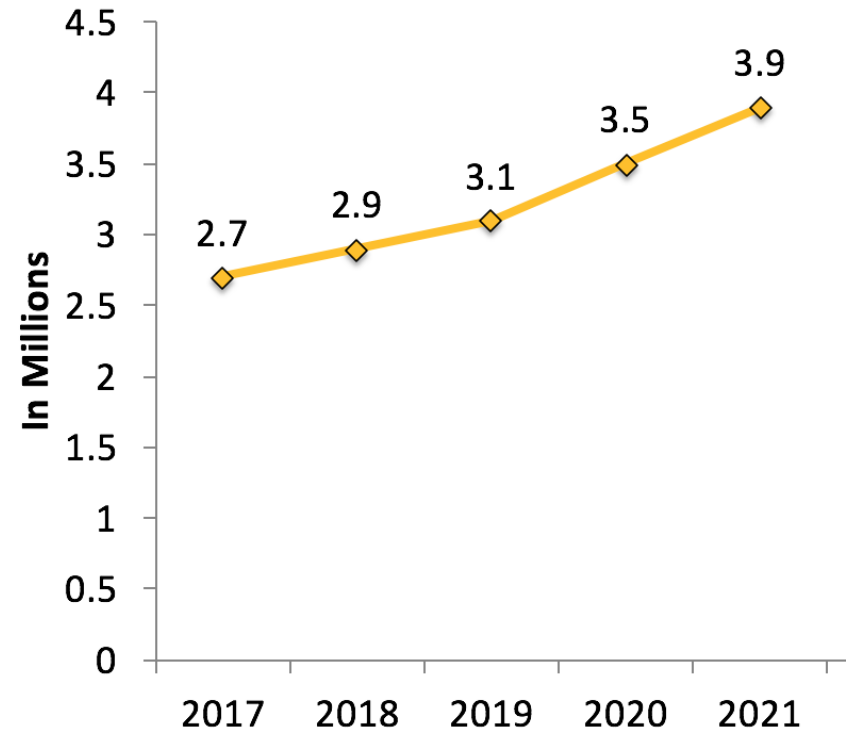


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Spending Allocation

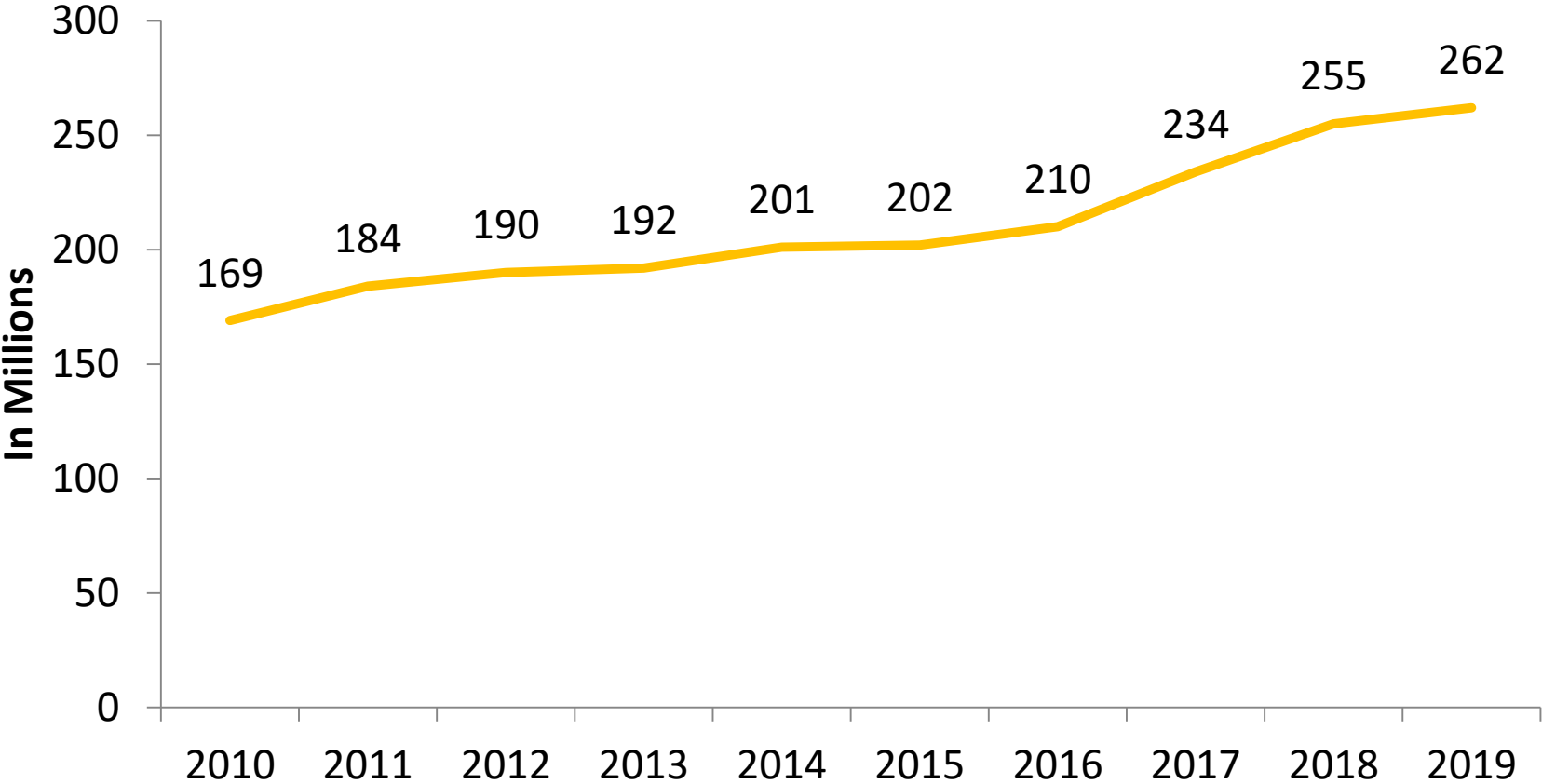
- Calculated on December 31, 2019
- Three Year Rolling Average
- Allocation for 2021 is at an all time high of nearly \$4 million
- Funds Deposited in Spending Account (No Market Fluctuation)
- No Impact on 2021 Spending Allocation



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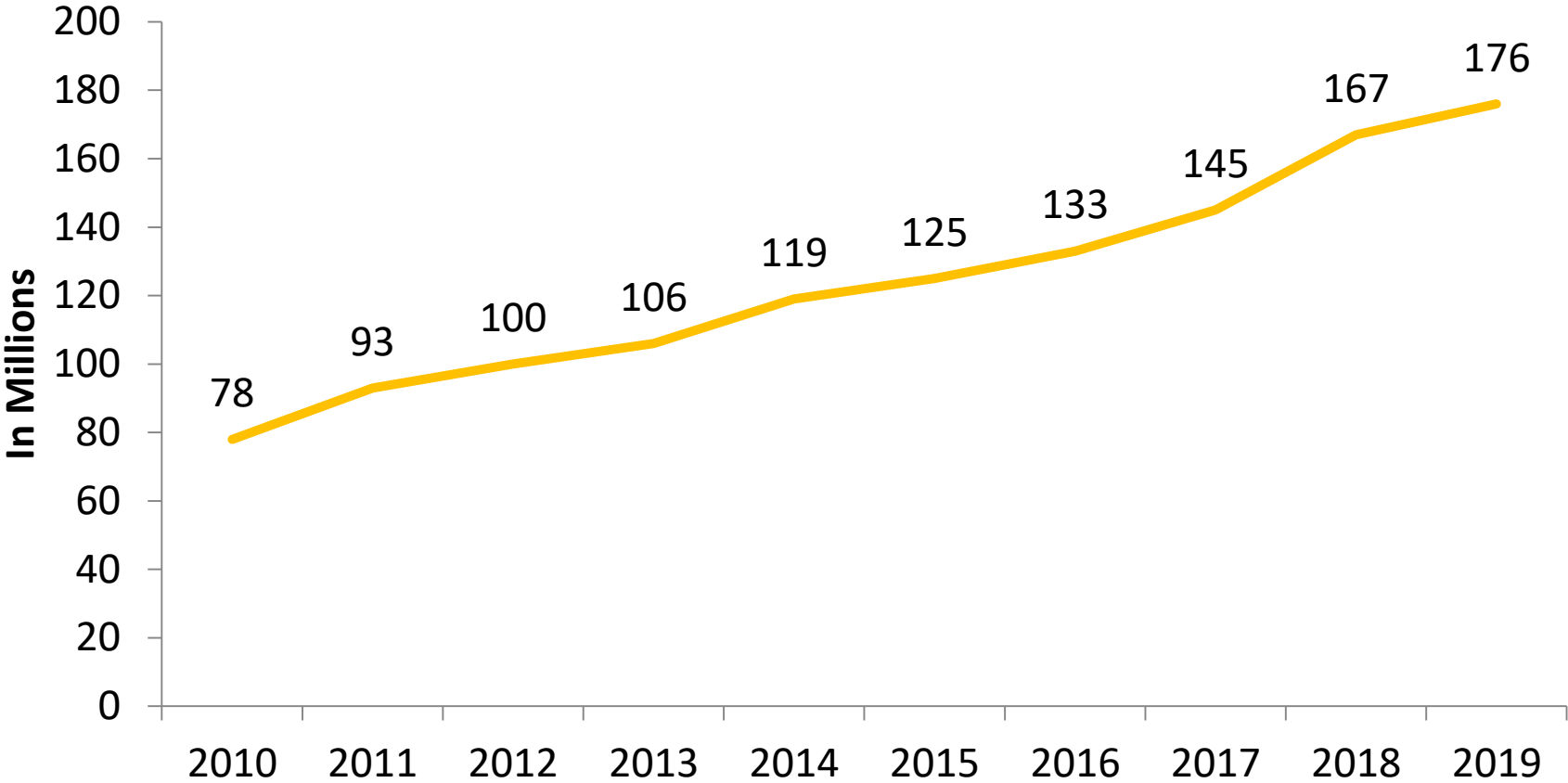
Total Assets



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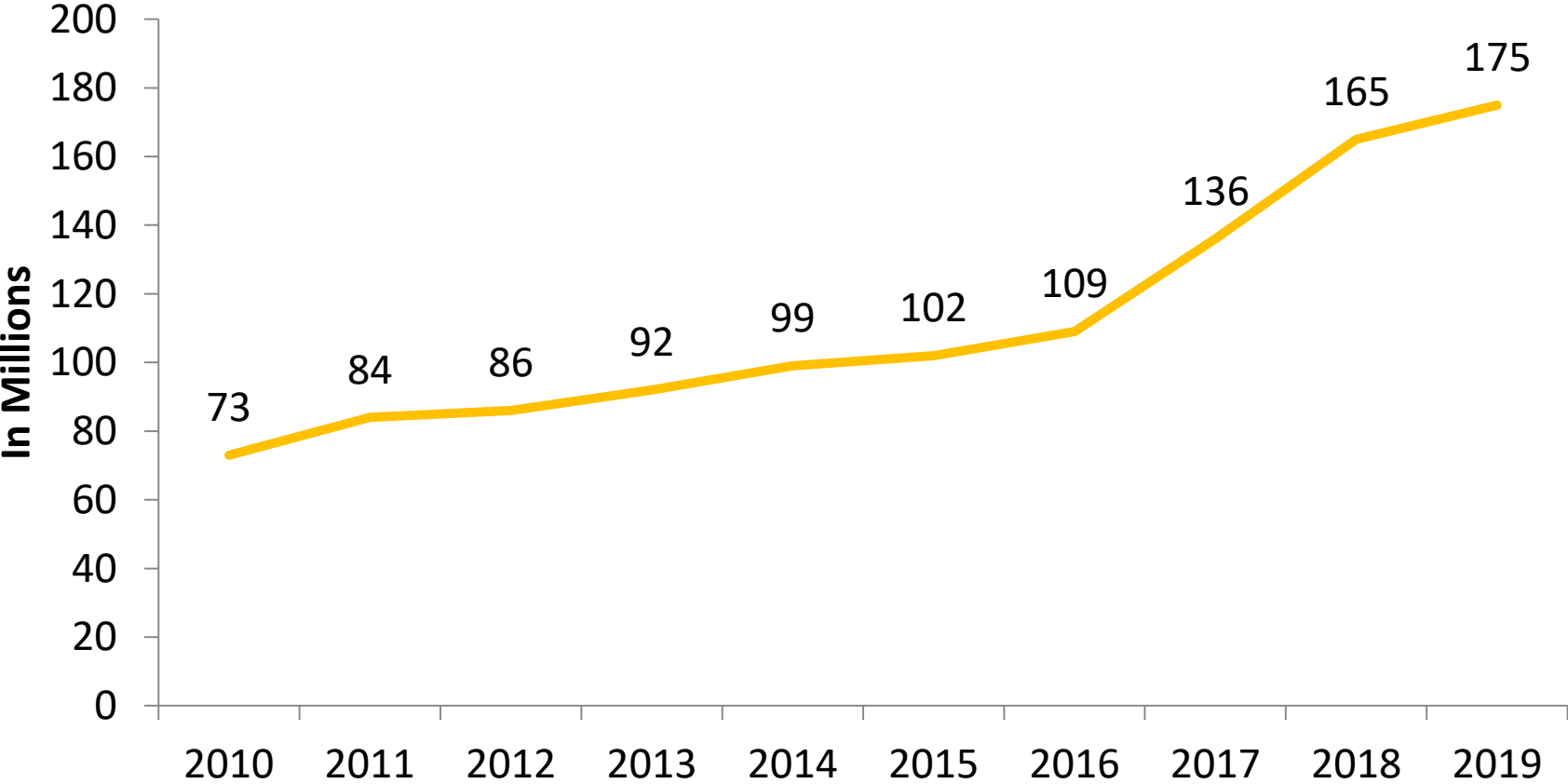
Net Assets



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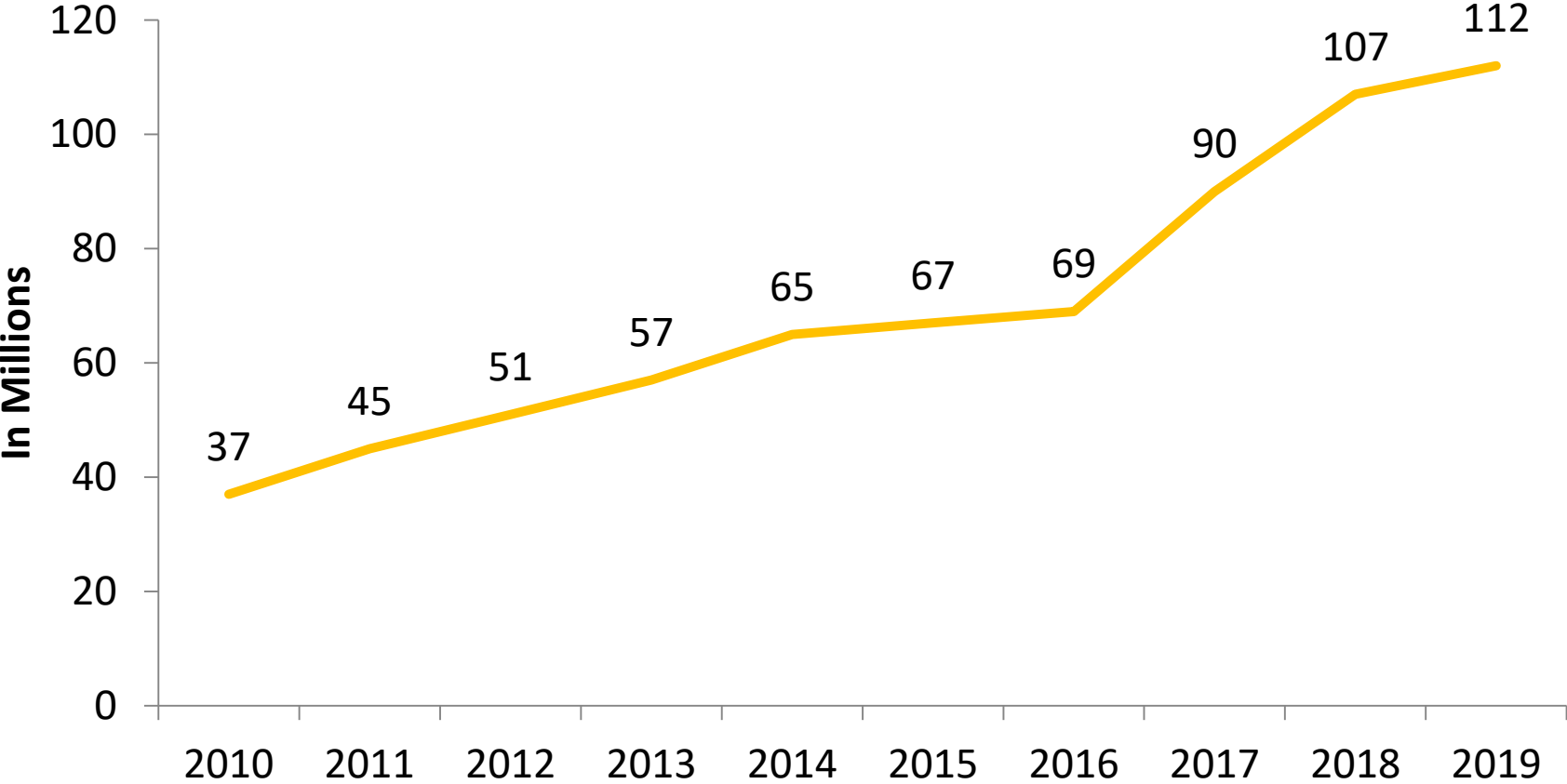
Investment Portfolio



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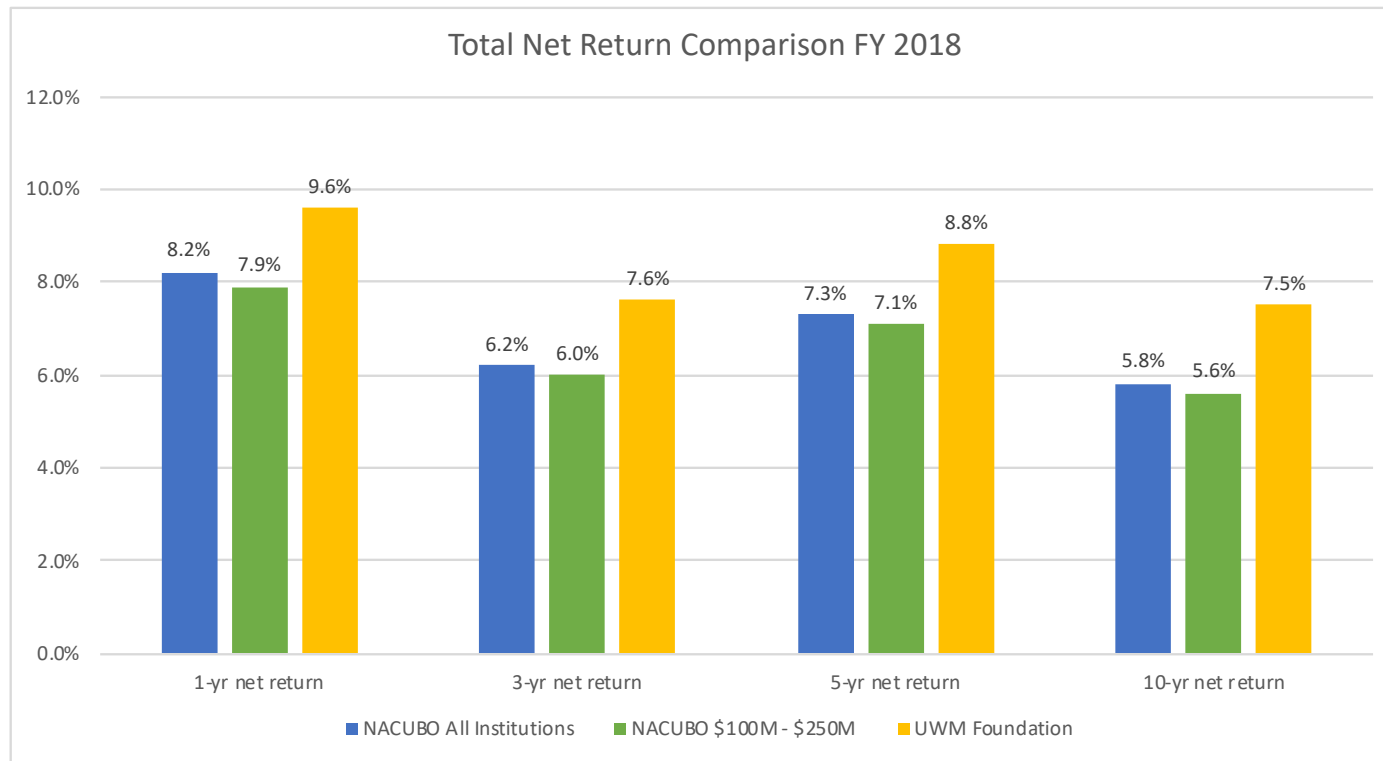
Endowment



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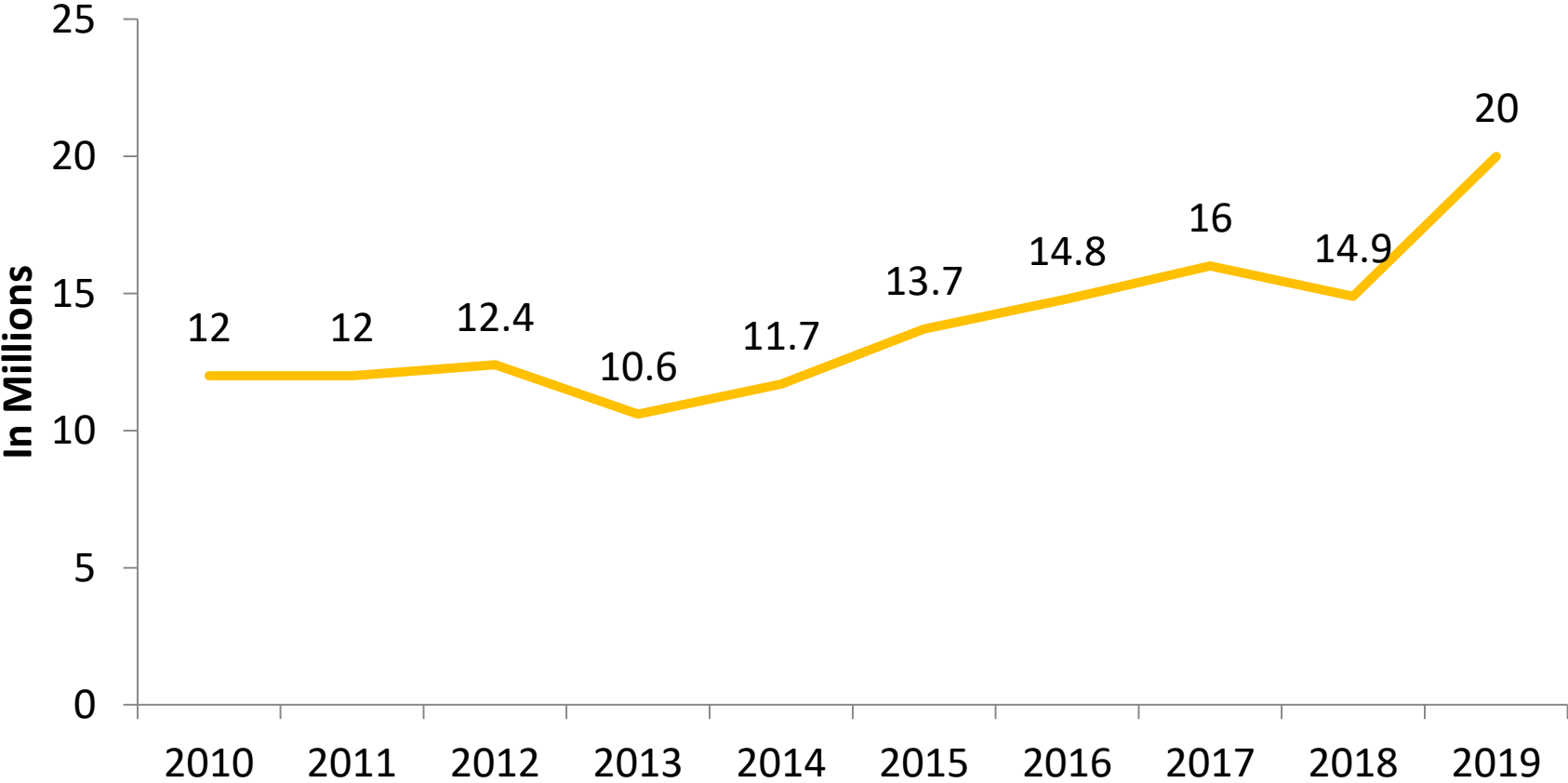
Investment Return Comparison (2018)



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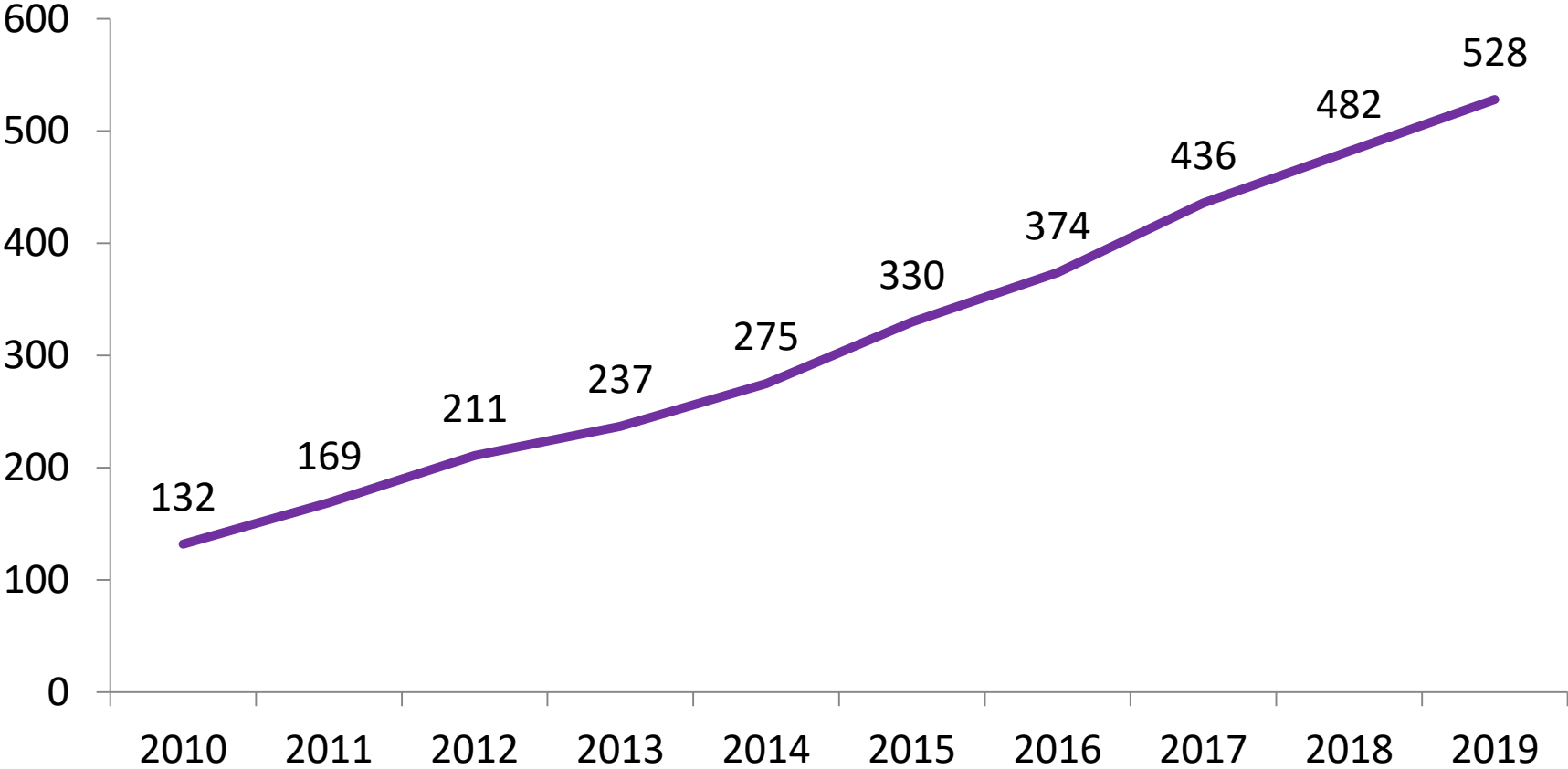
Campus Expenditures



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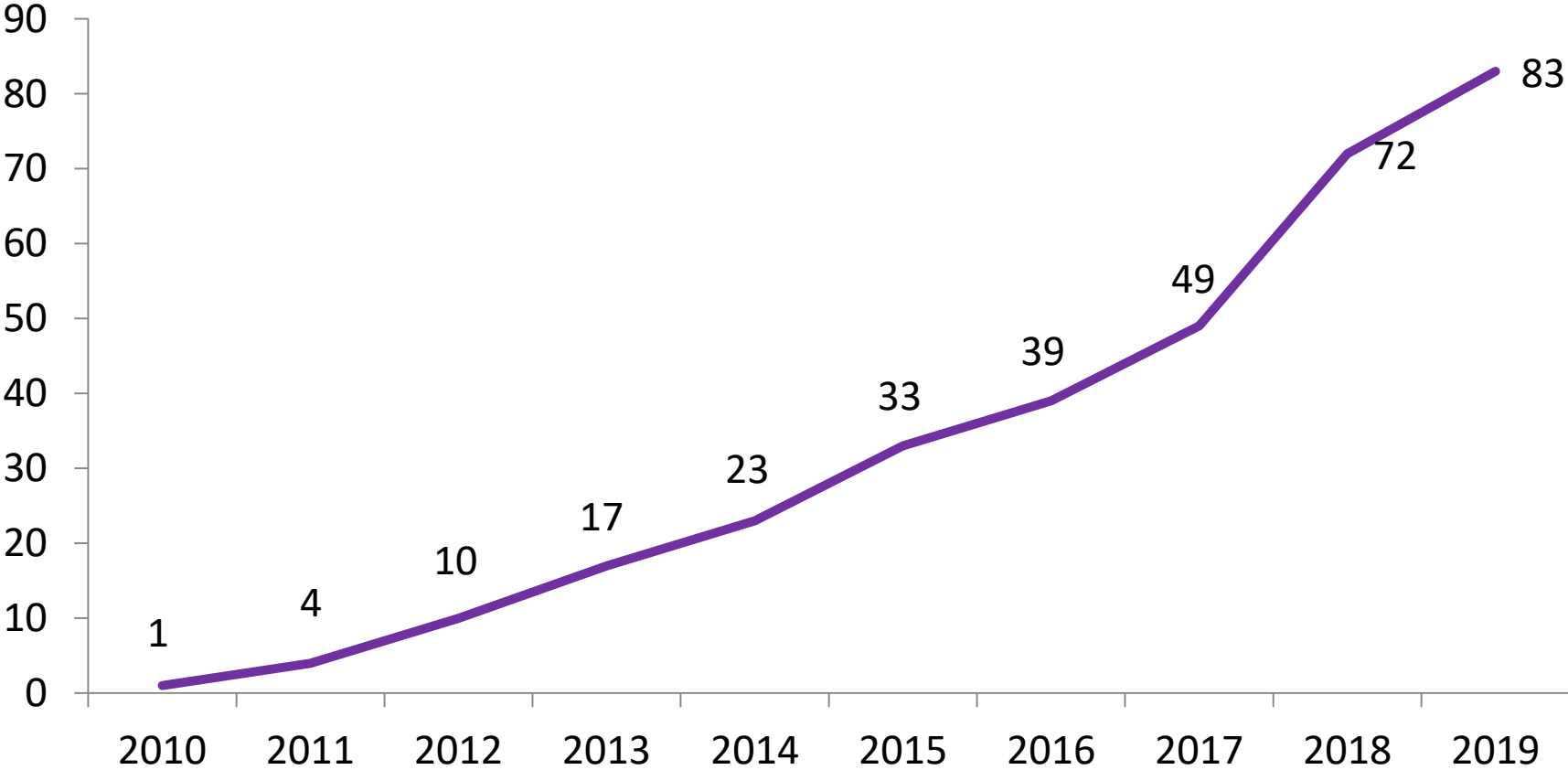
Cumulative Annual Invention Disclosures



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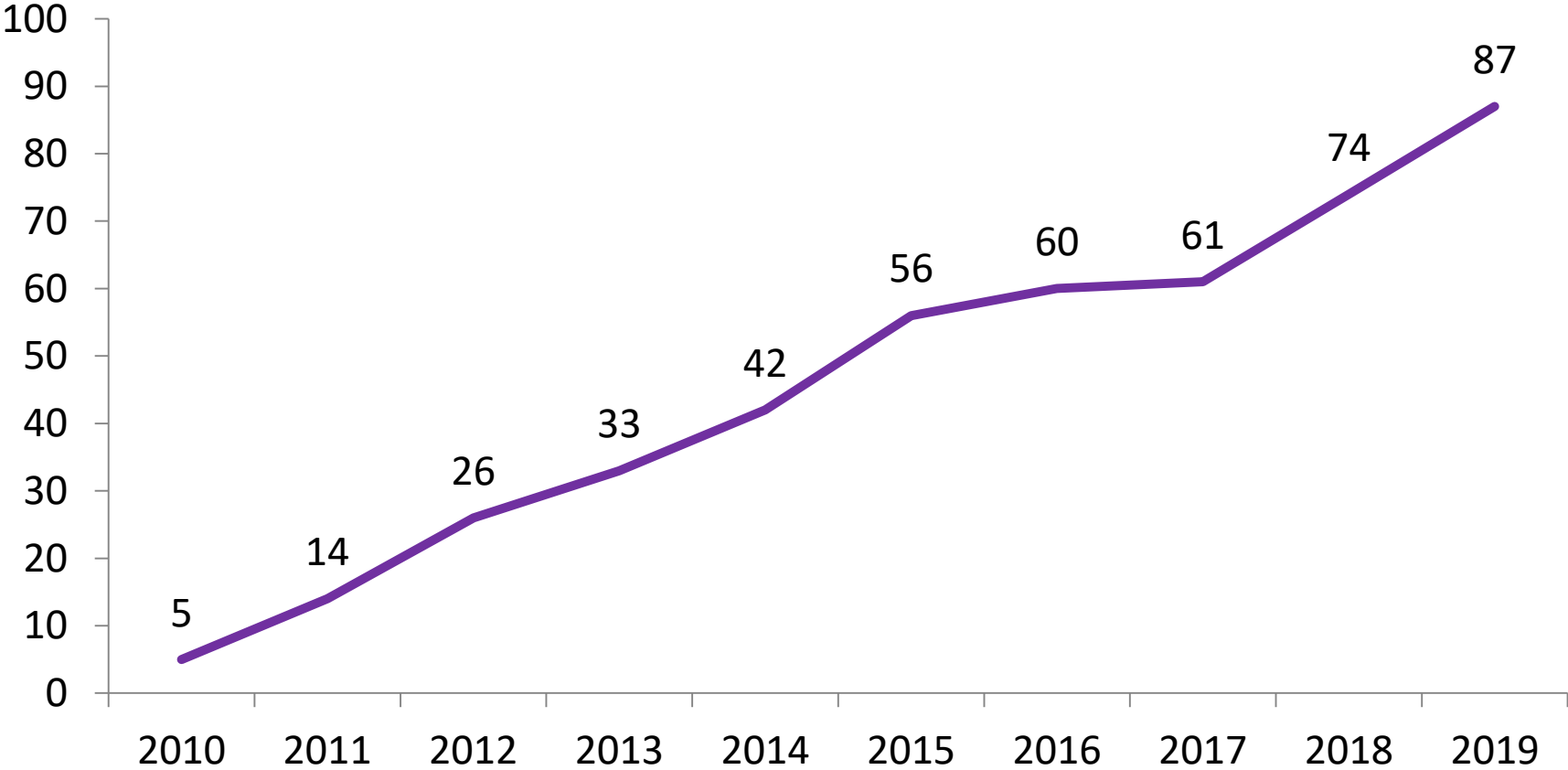
Cumulative Issued Patents



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Cumulative Annual License/Options





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