

ENDOWMENT REPORT

2016

NKU NORTHERN
KENTUCKY
UNIVERSITY
FOUNDATION

Our endowment allows donors to create a lasting impact by investing in our students and the resources that support their success: scholarships, academic programs that distinguish NKU from its peers, student research, faculty excellence, and our outstanding facilities.

The endowment provides a firm foundation of assets that are held in perpetuity, providing long-term sustainable support that allows us to help our students achieve their educational goals, fueling a lifetime of continued development and achievement.



146%

INCREASE IN GIFTS
FOR YEAR ENDED JUNE 30, 2016
WHEN COMPARED TO
YEAR ENDING JUNE 30, 2015

\$781,100

**AVAILABLE FOR
FACULTY SUPPORT**
FOR YEAR ENDED JUNE 30, 2016

293

INDIVIDUAL FUNDS
MAKE UP THE NKU FOUNDATION
ENDOWMENT



TRAVIS "TJ" SCHUYLER
DISTINGUISHED SCHOLARSHIP RECIPIENT



JULIA STEFFEN
STRAWS BIOLOGY STUDY ABROAD ENDOWED
SCHOLARSHIP RECIPIENT

STUDENT IMPACT

If there's one thing **Travis "TJ" Schuyler** loves, it's science. TJ started out at NKU as a biology student on the pre-med track but ended up switching to chemistry. As if chemistry wasn't hard enough, he added a physics minor to his curriculum during his junior year.

While TJ involved himself on campus—his biggest focus was undergraduate research. TJ was the first NKU chemistry major to conduct research abroad at the Universitaire de Technologie in Lannion, France, and he pioneered the expansion of an international research program to become a true exchange program.

"I'm way beyond where I thought I would be," TJ says. "You'd be amazed what you can accomplish if you believe in yourself. I wouldn't have any of this if it wasn't for Dr. Isabelle Lagadic. She really invested a lot of time in me."

In recognition of TJ's student success, he was awarded the Faculty Senate Award at the 2016 Senior Awards Luncheon, recognizing his exceptional skills and productivity in an independent study project. He was also named one of two Outstanding Seniors in Chemistry.

TJ's achievements were made possible in part by the Distinguished Scholarship he was awarded for the

2014-15 academic year providing full tuition, room and board. This institutional scholarship fund is supported by generous endowed gifts provided by Huntington Bank, Alice Sparks, Ron and Sherri Noel and Bill and Betty Verst. Scholarships such as these remove the financial burden of attending college, allowing amazing students such as TJ to focus on their research activities and studies.

TJ graduated cum laude in May 2016 and is headed to the University of Kentucky to study astrobiology and hopes to one day become a college professor.

Julia Steffen came to NKU because of excellence in academics and she found the "the up-close and personal college experience" she truly desired.

Perhaps the best of her life experiences so far have been her education abroad trips. She travelled to Spain in the summer of 2013 where she studied in Segovia, Spain, for a month. During that time, she lived with a host family, went to a bullfight, took two Spanish courses, and traveled to numerous Spanish cities.

"Not only did I increase my knowledge of the Spanish language, but I was introduced to a new culture which I learned to

embrace and appreciate," Julia says.

These experiences were made possible in part by the generosity of Dr. Carol Swarts, a member of the NKU Foundation Board of Directors, through her funding of the Straws Biology Study Abroad Endowed Scholarship. (Yes, Straws is Swarts spelled backwards!)

"I have especially benefited from private giving, as I am an NKU Distinguished Scholar and the recipient of the Straws Biology Study Abroad Endowed Scholarship, so private giving supported all of my undergraduate costs," Julia says.

"I am especially grateful that I did not have to worry about funding my education at NKU, because it allowed me to stay concentrated on my studies."

Julia's next adventure will be applying to graduate schools for physical therapy in order to fulfill her dream of working to help disabled children. NKU has provided the foundation.



\$2 MILLION
PAID FOR STUDENT
FINANCIAL AID
FOR YEAR ENDED JUNE 30, 2016

863
STUDENTS
RECEIVING
SCHOLARSHIPS
FOR YEAR ENDED JUNE 30, 2016

NKU
ENDOWMENTS
PROVIDE
FUNDING FOR:

ACADEMIC
SUPPORT

INSTRUCTION

PUBLIC
SERVICE

RESEARCH

STUDENT
FINANCIAL
AID

UNIVERSITY
FACILITIES
AND
EQUIPMENT

DONOR IMPACT

When John F. Winkler, II '88 was just 12 years old, his father died suddenly. Mr. Winkler says, "A lot of my motivation to give back comes from the hope that my father can look down on me from heaven with a smile and be proud of what I've accomplished." Mr. Winkler and his wife, Linda, NKU '86 '90 have been Chase Law School supporters since the early 1990's. In 2015, they made an estate planning gift to benefit future generations of Chase students. Winkler said, "I want this gift to be a thank you to Chase Law School for accepting me years ago and one way for me to show how proud I am to be a NKU grad."

After Chase Law School, Mr. Winkler went on to have an impressive career. He recently retired as vice president and regional trust manager for Park National Bank of Southwestern Ohio and Northern Kentucky. Linda, a certified public accountant, earned her associates degree and bachelor's degree in accounting from NKU. She retired two years ago after spending 26 years with Central Trust/PNC and 14 years with Procter & Gamble in their credit and treasury departments.

Originally from Wisconsin, Mr. Winkler earned his undergraduate degree from the University of Wisconsin and his Juris Doctor from Chase. Mr. Winkler also received an M.B.A. from the University of Chicago and received an LL.M. in tax and an LL.M. in business law from Capital University Law School.



JOHN F. WINKLER, II AND HIS WIFE LINDA BRAUN WINKLER

He served on the NKU Foundation Board of Directors as a member of its Investment Committee, he is a member emeritus of NKU's Friends of Steely Library, and served on the Chase Board of Advisors from 2000 to 2005. NKU and Chase Law School are grateful for the Winkler's support. Their estate gift will ensure that future generations of law students receive the financial assistance needed to concentrate more fully on their academic endeavors.

ENDOWMENT IMPACT

One of the primary goals of the NKU Foundation is to exercise effective and responsible stewardship of the gifts to the university. The NKUF Investment Committee, in consultation with its professional investment advisor,

Fund Evaluation Group, LLC (FEG), proactively manages the foundation's portfolio. Staff and Investment Committee members offer diverse areas of expertise which bring a wealth of financial experience to the management of the Foundation's investments.

With the input of FEG, the Investment Committee hires investment managers whose portfolios fit within the Foundation's investment policy of long-term growth and minimizing risk versus reward.

Target allocations and investment managers are reviewed on a quarterly basis to ensure objectives are being met and assets are rebalanced to keep them in line with the target ranges for each asset class.

\$89.4 MILLION
ENDOWMENT POOL
MARKET VALUE
AS OF JUNE 30, 2016

\$109,399,000
IN TOTAL ASSETS
AS OF JUNE 30, 2016

ABOUT THE NKU FOUNDATION

Our Mission

Our mission is to secure, invest, steward, and distribute private resources in support of Northern Kentucky University, to advocate for the University's best interests, and to build lasting relationships with alumni and friends.

Our 2020 Vision

We will be recognized by the NKU community, donors and friends, peer organizations, and regional leaders for excellence in fundraising, stewardship, and advocacy which advances Northern Kentucky University.