



SOUTHWESTERN MEDICAL FOUNDATION

Giving the Gift of Better Health

Southwestern Medical Foundation provides:

- Sustainable funding for medical research
- Training for the next generation of physicians
- Stable partnership helping to attract the best and brightest medical faculty
- Funding in perpetuity for our primary beneficiary

Thank you to leaders and donors who provide the vision and means to assure our mission is fulfilled and medicine in the Southwest is advanced.

How **You** Have Given the Gift of Better Health



Drs. John Warner and Mack Mitchell, holders of:

- Nancy S. and Jeremy L. Halbreich Professorship in Gastroenterology in honor of Dr. Mack Mitchell
- Nancy and Jeremy Halbreich, Susan and Theodore Strauss Professorship in Cardiology honoring Dr. John Warner



Families like yours truly embody what I love most about UTSW: the dedication to helping both the community and UTSW family. I can only hope that once I am a physician, I will also be able to give back.

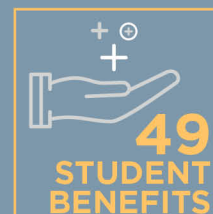
Emiliya Usheva
Student
UT Southwestern Medical School

Service to Community

Through campaigns like *Endowing the Future of Medicine*, our community increased strategic focus on building our endowment and sustainable funding.

In 1993, there were 46 endowed funds. As of 2017, there were 462.

What Our Endowed Funds Benefit

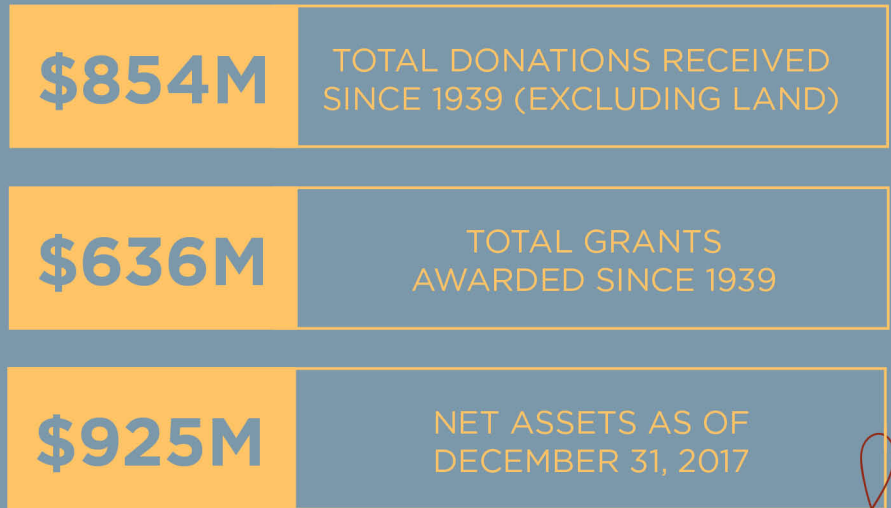


Worthy Vision of Excellence

Thank you to **700 donors** who gave **\$31 million** in 2017.

In 2017, **\$32 million** in grants supported excellence in medical education, life-changing medical research, and patient-centered clinical care.

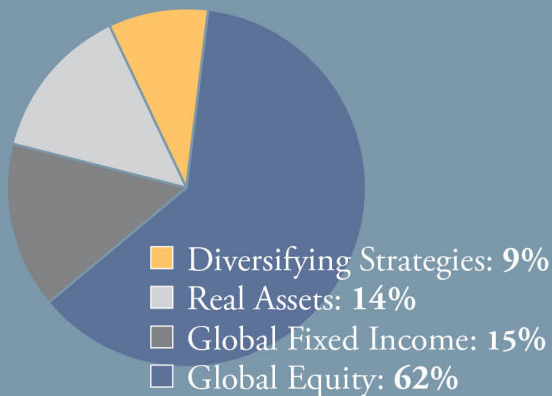
Generosity + Stewardship = Impact



Mindful Stewardship

Long-Term Pooled Assets

Diversified asset allocation and performance maximize the impact of your gifts.



Fact-Based Decisions and Best Outcomes Long-Term Investment Portfolio Performance

	1 YEAR	5 YEAR	SINCE INCEPTION <i>(9/89)</i>
<i>Investment Portfolio</i>	15.3%	8.1%	8.2%
<i>Broad Policy Index</i>	15.4%	6.8%	7.6%



Leading Industry Benchmarks



85% of all Foundation expenses go directly to programs

\$0.05 cost to raise \$1



⊕ INVESTMENT STRATEGY ENABLES A ROBUST **4.5% PAYOUT RATE** TO SUPPORT PROGRESS IN MEDICINE.*

We aim to achieve the highest possible status with both Charity Navigator and GuideStar, the two leading charity watchdog organizations. These numbers represent the 5-year average.

*Calculated over trailing 12 quarter average