

Inspiring Progress in Medicine

Southwestern Medical Foundation is a visionary institution inspiring and advancing progress in medicine.

The Foundation connects the vision of donors with highly innovative programs and serves as a sustainable funding source for leading edge research, medical education and patient care.

In leading this mission forward, we are guided by four building standards: Service to Community, Vision of Excellence, Mindful Stewardship, and Best Outcomes. Each standard is a promise to donors, beneficiaries, and generations to come, assuring the Foundation is positioned to provide significant capital for medical progress in our community and the world beyond.

Gifts for Better Health



Robert B. Rowling, Chair,
Campaign for the Brain

\$25M


Terry and Robert B. Rowling Fund
in support of the Peter O'Donnell Jr.
Brain Institute at UT Southwestern

\$2M


Miller Family Distinguished University
Chair in Neurologic Disease
(Includes \$1M pledge given in 2016)

\$1M


Margaret Jonsson Rogers Fund for
Blood Cancers Translational Research
in Honor of Robert Collins, MD



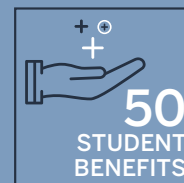
Dallas Mayor Mike Rawlings at dedication
of Historical Marker on site of original
Southwestern Medical College

Service to Community

In **1993**, there were **46** endowed funds. As of **2018**, there were **466**.

Through the *Endowed Chairs and Innovations in Medicine* campaigns, our community increased strategic focus on building our endowment and sustainable funding.

What Our Endowed Funds Benefit



Best Outcomes

Leading Industry Benchmarks



85%
of all Foundation
expenses go directly
to programs

\$0.04
cost to raise \$1

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

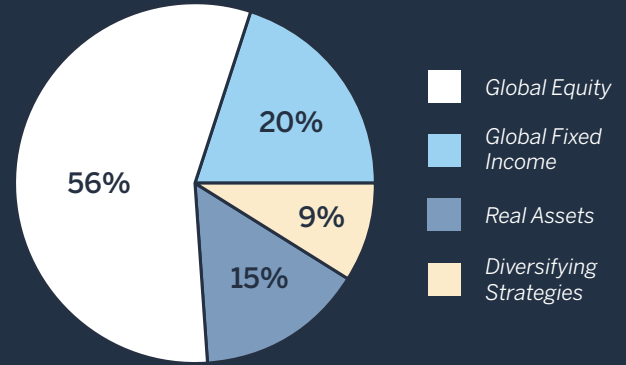
Generosity + Stewardship = Impact

\$890M	TOTAL DONATIONS RECEIVED SINCE 1939 (EXCLUDING LAND)
\$668M	TOTAL GRANTS AWARDED SINCE 1939
\$900M	NET ASSETS AS OF DECEMBER 31, 2018

Mindful Stewardship

Long-Term Pooled Assets

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



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

*CALCULATED OVER TRAILING 12 QUARTER AVERAGE.

Vision of Excellence

Thank you to nearly **700 donors** who gave **\$36 million** in 2018.

In 2018, **\$32 million** in grants supported excellence in medical education, life-changing medical research, and patient-centered clinical care.

\$56M
IN BRAIN RELATED
GIFTS FROM
2015-2018



Long-Term Investment Portfolio Performance

AS OF	1 YEAR	10 YEAR	SINCE INCEPTION (9/89)	
12/31/18				
Investment Portfolio	-4.0%	8.3%	7.8%	
Broad Policy Index	-7.2%	7.2%	7.1%	
AS OF	3 MONTHS ENDING FEB 2019	1 YEAR	10 YEAR	SINCE INCEPTION (9/89)
2/28/19				
Investment Portfolio	2.7%	1.7%	10.2%	8.0%
Broad Policy Index	2.8%	1.1%	10.0%	7.3%