



## MEMORANDUM

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**TO:** UUA Board of Trustees  
**FROM:** Tim Brennan  
**RE:** Endowment participation request  
**DATE:** September 12, 2014

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Under the Investment Policy of the Board of Trustees (Appendix 2B), “The UUCEF accepts investments from the following: . . . Other UU organizations approved by the Board of Trustees following application to the Treasurer.” The Treasurer then reviews the application and makes a recommendation to the Board.

We have received request from the Southeast UU Summer Institute (SUUSI) to set up an account in the UU Common Endowment Fund.

Under their by-laws, the purpose of the organization is as follows: “to devote its resources to Unitarian Universalist religious and educational activities, and to sponsor a weeklong summer program for adults and children, called the Summer Institute.”

Therefore, I recommend that the SUUSI be permitted to participate in the UU Common Endowment Fund.

**Motion**

To approve the participation of the Southeast UU Summer Institute (SUUSI) in the UU Common Endowment Fund.