

About the Firm

A Summary

At September 30, 2021, TIAA Kaspick's total assets under management were \$8.1 billion, including one of the largest portfolios of planned gifts in the country. The firm is recognized nationally for the quality and breadth of its services. TIAA Kaspick's clients include many of the preeminent educational, medical, religious, and service organizations in the nation.

We work in close partnership with our clients and their donors to provide the essential elements of a well-managed planned gift: sophisticated asset management, timely and accurate administration, and informative reporting. As specialists in planned giving, we have developed our systems and services to meet the needs of our clients and their donors. Our services are comprehensive and highly integrated. Our experienced staff and innovative approach have set the standard for planned gift management and administration.

The TIAA Kaspick investment team combines extensive investment experience with expertise in planned giving to successfully manage planned gifts of all types, including charitable remainder trusts, lead trusts, gift annuities, and pooled income funds. TIAA Kaspick's approach to investment management takes the principles of modern endowment theory and practice and adapts them to the needs of planned gifts.

TIAA Kaspick's gift administration team has extensive experience with all types of charitable trusts and gift annuities. We help to ensure the efficient transfer of funding assets, timely delivery of beneficiary payments, accurate tax reporting, and regulatory compliance for all accounts. We also provide clients, donors, beneficiaries, and their advisors with detailed reporting, much of which is available on our secure website, so they are well informed about their gifts.

Founded in 1989, TIAA Kaspick has over 105 employees, and offices in Redwood Shores, CA, Boston, MA, and St. Louis, MO. TIAA Kaspick is a member of the TIAA group of companies. TIAA, a national financial services organization managing \$1.3 trillion in assets as of June 30, 2021, is the leading provider of retirement services to individuals and institutions in the academic, research, medical, philanthropic, and cultural fields. ■

TIAA Kaspick Planned Giving Clients

ACLU Foundation of Southern California	Henry E. Huntington Library and Art Gallery	University of Pennsylvania
Alzheimer's Association	Indiana University Foundation	The Pennsylvania State University
American Red Cross	Iowa State University Foundation	Phillips Academy
The University of Arizona Foundation	JDRF International	Pomona College
University of Arkansas Foundation	Johns Hopkins University & Medicine	Princeton University
Bates College	The Kansas University Endowment Association	Reed College
Berea College	Kenyon College	Rensselaer Polytechnic Institute
Bowdoin College	KQED Inc.	Rice University and Rice Trust Inc.
Brandeis University	Lucile Packard Foundation for Children's Health	Rochester Institute of Technology
Bucknell University	Luther College	Saddleback Memorial Foundation
University of California, Berkeley Foundation	Luther Seminary	St. Olaf College
University of California, San Francisco Foundation	Macalester College	Saint Paul & Minnesota Foundation
California Institute of Technology	Masonic Grand Lodge of California	The Salvation Army, U.S.A. Western Territory
The UCLA Foundation	Massachusetts Institute of Technology	San Francisco Symphony
Cal Poly Corporation and Cal Poly Foundation	Mayo Clinic	Santa Clara University
Carleton College	Middlebury College	Seattle University
Carnegie Mellon University	Mills College	The Sierra Club Foundation
The University of Chicago	University of Minnesota Foundation	Silicon Valley Community Foundation
City of Hope	Mississippi State University Foundation	University of Southern California
Claremont McKenna College	University of Missouri	Southern Methodist University
Colgate University	University of Montana Foundation	Southern Oregon University Foundation
University of Colorado Foundation	Montana State University Foundation	Stanford University
Colorado School of Mines Foundation	Mount Holyoke College	Texas A&M Foundation
Community Foundation for Monterey County	The Nature Conservancy	Trinity College
Dartmouth College	NC Gift Planning, LLC	The Trust for Public Land
University of Delaware	The University of North Carolina at Chapel Hill	Tufts University
University of Denver	North Carolina State University Foundation, Inc.	University of Utah
DePaul University	University of North Dakota Alumni Association & Foundation	Valparaiso University
DePauw University	Northwestern University	Vanderbilt University
The Episcopal Diocese of California	Oberlin College	Vassar College
The First Church of Christ, Scientist	Occidental College	The Vermont Community Foundation
University of Florida Foundation, Inc.	The Ohio University Foundation	University of Virginia
Franklin & Marshall College	The Ohio State University Foundation	Virginia Tech Foundation
Georgetown University	Oklahoma State University Foundation	Wake Forest University
Georgia Tech Foundation, Inc.	Oregon Community Foundation	University of Washington
Gordon-Conwell Theological Seminary	University of Oregon Foundation	Washington State University Foundation
Grinnell College	Oregon State University Foundation	Wesleyan University
Groton School	University of the Pacific	Whitman College
Gustavus Adolphus College	Pacific Lutheran University	Whitworth Foundation
Hamilton College		Willamette University
Harvard University		Williams College
		The College of Wooster