

Endowed Funds

Brooks School currently manages over 130 individual endowment funds with a cumulative value of almost \$102 million on June 30, 2021. The primary areas of focus for our endowment funds are financial aid, faculty support, program support, and campus facilities. The trustees have established endowment spending policies to meet current needs and protect the future purchasing power of all funds. The endowment draw rate for operations, including principal payments on outstanding debt, was 4.3 percent in fiscal year 2021. Endowment support is a critical component of the school's operating budget, so it benefits every student every day. We are grateful for the thoughtful generosity of our donors who have both established and contributed to our endowment funds.

All figures are as of June 30, 2021.

Aitken Performing Arts Fund

Market Value \$92,282.71

Alumni Association Fellowship

Market Value \$138,204.90

Alumni Association Scholarship

Market Value \$176,683.22

Alumni Class of 1947 Scholarship

Market Value \$58,592.33

Art Center Program Endowment

Market Value \$208,315.92

Frank D. Ashburn Athletic Prize

Market Value \$89,369.76

Frank D. Ashburn Chair in Leadership and Education

Market Value \$1,809,547.77

Established in 1996 by gifts from the George F. Baker Trust and others to endow a Chair which supports the salary, professional development and the scholarly pursuits of Brooks' future heads of school.

FDA Class of 1957 Faculty Fund

Market Value \$979,767.77

Frank D. Ashburn Faculty Salaries

Market Value \$3,740,964.47

Established upon Frank D. Ashburn's retirement to be used for faculty salaries.

Ashburn Scholars Fund

Market Value \$482,962.24

Frank D. Ashburn Scholarship

Market Value \$3,349,309.63

FDA Speakers Forum

Market Value \$376,946.19

Phyllis B. Ashburn Fund

Market Value \$123,356.80

Athletic Center Operations

Market Value \$1,718,485.26

Blair Fellowship

Market Value \$237,802.94

George Blake Fund

Market Value \$132,232.35

Bishop Fund

Market Value \$66,123.28

Boldly Brooks Faculty Fellowship

Market Value \$173,602.38

Brooks School China Scholarship Fund

Market Value \$925,995.65

Established in 2011 by Samuel W. Chu '80 to provide financial aid to students from Hong Kong or China who demonstrate financial need.

Henry M. Buhl Fund

Market Value \$15,763.88

Building & Improvements Fund

Market Value \$411,236.39

Bullock Family Scholarship Fund

Market Value \$77,759.45

Peter C. Buswell '53 Fund for the Visual Arts

Market Value \$221,857.90

Campaign 1985 Fund for Faculty Salaries

Market Value \$1,507,032.01

Campaign '95 Faculty Salaries Fund

Market Value \$751,379.82

Campaign '95 Scholarship

Market Value \$65,385.40

Campaign Fund for Faculty Support

Market Value \$1,906,895.99

Established in 2017 with lead gifts from members of the 50th reunion class of 1967, and augmented through additional gifts made through *The Campaign for Brooks*.

Campaign Fund for Financial Aid

Market Value \$2,536,414.44

Established in 2014 with a lead gift John R. Barker '87, P'21, P'23, and subsequently augmented through additional generous gifts made through *The Campaign for Brooks*. Income from the fund will provide financial aid to students.

George W. Carpenter Memorial Scholarship

Market Value \$674,905.33

Established in 1967, funds to be used to provide financial aid to students in the last three years of high school.

The Malcolm G. Chace III Prize

Market Value \$127,511.95

Established in 1987, this prize is awarded to a third-, fourth- and fifth-former who, in the judgement of the head of school, has made the most personal progress during the year.

Chapel Fund

Market Value \$47,997.19

Class of 1962 Endowed Fund for Faculty Professional Development

Market Value \$156,491.09

Cogswell Family Scholarship

Market Value \$1,053,284.55

Computer Fund

Market Value \$42,020.78

Charles C. Cottingham '08 Chinese Prize Fund

Market Value \$3,084.55

Danforth Association Fellowship

Market Value \$138,204.89

Danforth Center Endowment

Market Value \$14,973.56

DeMoulas Foundation Fund

Market Value \$178,751.51

DeWitt-Wallace Reader's Digest Scholarship

Market Value \$694,672.22

Dula Foundation Fund for Faculty Support

Market Value \$391,126.04

Emergency Faculty Fund

Market Value \$294,902.59

Endowed Scholarship Fund

Market Value \$76,157.76

Established anonymously in 2018. The fund shall be used to provide financial aid scholarships.

Endowment for Students on the Forefront of Science

Market Value \$137,198.54

Nick Evangelos

Endowed Chair in Science

Market Value \$139,007.78

Nicholas J. Evangelos Scholarship

Market Value \$185,510.27

Norman and Frances Fleming Fund for Faculty Development

Market Value \$62,894.32

Patrick S.C. Flynn Scholarship

Market Value \$88,610.09

Established in 2004 by a gift from the parents, grandparents and former employer of Patrick Flynn '94 and others.

Edward E. Ford Scholarship

Market Value \$176,169.74

Foster Fund

Market Value \$253,515.87

Hunter and Hugh K. Foster Fund

Market Value \$277,958.19

Hugh K. Foster Memorial Fund

Market Value \$254,769.28

General Endowment Fund

Market Value \$10,108,238.84

An investment fund which is overseen by the investment committee of the board of trustees. Regular withdrawals from the invested capital are used for ongoing operations.

General Faculty Fund

Market Value \$2,240,764.39

General Scholarship

Market Value \$688,946.81

Robert Goelet Association Fellowship

Market Value \$138,204.90

Charles Hayden Foundation Scholarship

Market Value \$167,698.03

William Randolph Hearst Scholarship

Market Value \$141,221.86

A. John Hettinger III '51 Scholarship

Market Value \$18,266,039.94

Mrs. Thomas Hitchcock Fellowship

Market Value \$552,825.38

Waldo and Ruth Holcombe Faculty Chair

Market Value \$1,458,022.52

Previously held by faculty emeritus Randall Hesse, who retired in June 2021. A new chair holder will be announced in fall 2021.

Richard Holmes Exchange Program

Market Value \$2,897,367.44

Established in 1991 in honor of Richard F. Holmes H'73, faculty emeritus (1948—1991), by gifts from the Pacer Foundation, Mrs. Hugh K. Foster W'46, P'86, P'88, and other donors, to support the Exchange Program.

Richard F. Holmes Founder's Chair

Market Value \$903,211.24

Established in 1997 with gifts from friends and former students in memory of Richard F. Holmes H'73, faculty emeritus (1948—1991), who served as assistant headmaster for 34 years. Income from the fund will be used to endow the holder's salary as well as a special supplemental fund to support activities associated with the chair. Currently held by Spanish teacher and School Year Abroad coordinator Lillian Miller.

Harriet F. Hutchinson Fund

Market Value \$158,876.37

Independence Foundation Faculty Chair

Market Value \$1,426,523.65

Currently held by Latin teacher Deborah Davies.

Independence Foundation Scholarship

Market Value \$857,706.86

Ittleton Fellowship

Market Value \$1,047,243.07

Kerri Kattar Prize Fund

Market Value \$12,881.38

Taryn L. King Memorial Scholarship

Market Value \$80,347.85

Established in 2009 in loving memory of Taryn L. King '03 with gifts from Tribal Lacrosse, members of the class of 2003, Mr. and Mrs. Paul S. King, and increased thereafter through the fundraising efforts of Kaylan Tildsley Alderson '03 and Pierce J. King. The fund provides financial aid for a student or students who, due to a sudden unforeseen and uncontrollable personal events, would not be able to continue at Brooks School without financial assistance. If there is no match in a given year, consideration would be for a day student girl who requires financial assistance.

Peter Kissel Association Fellowship

Market Value \$130,185.79

F. Warren Knowlton III '67 Memorial Drama Fund

Market Value \$62,171.03

Alexander Laughlin Fellowship

Market Value \$552,825.38

Stephen G. Letarte '66 Financial Aid Fund

Market Value \$491,531.11

Established in 2016 by the class of 1966 in memory of their classmate who died of leukemia at just 24 years old, with lead gifts from Thomas H. Livermore '66 and Juan M. Echavarría '66, and other gifts from members of the class of 1966 in honor of their classmate Stephen G. Letarte '66. Income from the fund will provide financial aid for a day student.

Library Fund

Market Value \$91,388.98

Josephine and H. Bailey Little Faculty Advancement Fund

Market Value \$223,566.54

Louis Lusk Library Fund

Market Value \$13,212.95

Lyman Association Fellowship

Market Value \$138,204.90

Henry Lyman Memorial Scholarship

Market Value \$298,175.29

Robert Marvel Class of '56 Scholarship

Market Value \$343,299.88

Established in 2011 with a gift from Robert Marvel '56, P'91, GP'23 to provide scholarship funds to a student demonstrating financial need, with preference given to children of alumni.

McCormick Fund

Market Value \$266,710.70

John M. McVey Faculty Fellowship

Market Value \$633,552.57

Established in 1995 by a gift from The Prince Charitable Trusts and others in honor of John M. McVey, teacher in history 1958-1997. Fund to be used to endow a faculty fund for professional development and salary. Annual distributions to be used for the professional development and salary of the appointee to the fellowship.

Edward S. & Winifred G. Moseley '40 Scholarship

Market Value \$56,351.62

Lawrence A. Murphy Memorial

Market Value \$601,064.72

Music Fund

Market Value \$62,201.37

Peter A. Nadosy Scholarship

Market Value \$1,624,137.42

Established in 2010 by Peter Nadosy '64 to endow a scholarship for students who demonstrate financial need and who maintain a ranking in the top half of their class.

Nadosy Science Fund

Market Value \$36,340.42

Peter Nicholson Memorial Scholarship

Market Value \$148,508.48

Pauline M. Nickerson Faculty Advancement Fund

Market Value \$51,254.37

Northup Community Service Endowment Fund

Market Value \$77,382.47

Henry O'Rea Fund I

Market Value \$151,662.09

Henry O'Rea Fund II

Market Value \$585,213.77

Organ Repair Fund

Market Value \$70,520.72

Pacer Foundation Day Student Scholarship

Market Value \$251,953.82

C. W. Eliot Paine Fellowship

Market Value \$245,600.44

Established in 1969 by a gift from Mr. C. W. Eliot Paine to establish a faculty fellowship as part of the 1969 Endowment Fund drive.

Parents Association Scholarship

Market Value \$124,237.79

Oliver Ames Parker Scholarship

Market Value \$227,587.35

Established in 1948 by gifts from Mr. and Mrs. William A. Parker P'37, P'39, GP'75, GP'76, GGP'14 and Amory Parker '37, P'75, P'76, GP'14 in memory of their son and brother, Oliver A. Parker '39. Funds shall be used for financial aid scholarships.

William Parker Fellowship

Market Value \$276,417.08

Leonard "Skip" Perkins Fund for Faculty Development

Market Value \$322,587.94

Class of 1956 — Leonard "Skip" and Maureen Perkins Scholarship

Market Value \$168,762.05

Perocchi Family Scholarship

Market Value \$535,119.13

Established in 2000 with a gift from William L. Perocchi '75 and Nanci Perocchi to provide financial aid for a qualified student from Lawrence, Mass., with special preference given to a boy or girl from the Lawrence Boys and Girls Club.

Endowed Funds

Pingree Association Fellowship

Market Value \$138,204.89

William K. Poirot Scholarship

Market Value \$741,731.16

Theodore Price Fund

Market Value \$359,032.16

Prince Family Teaching Chair

Market Value \$1,002,700.47

Currently held by English teacher Leigh Perkins '81.

Prize Fund

Market Value \$246,455.33

Quasi Endowment for Faculty Horizons

Market Value \$544,171.52

Quasi Endowment Fund

Market Value \$14,259,994.30

Carl B. Robbins Exchange Program Fund

Market Value \$430,002.08

Established in 2010 with a gift from the Robbins Family, including parents Allan J. and Cera B. Robbins and sister Mary J. (Muffie) Robbins '85. Fund to be used to support the Exchange Program, providing student access to enriching exchange experiences.

Oscar Root Memorial

Market Value \$119,812.09

Royce Science Fund

Market Value \$57,827.24

John D. Rullo Endowed Scholarship Fund

Market Value \$137,077.83

Saltonstall Library Fund

Market Value \$44,242.27

Chris St. George Association Fellowship

Market Value \$110,565.49

Schelzi Family Financial Aid Fund

Market Value \$127,566.15

Schiff Foundation Faculty Fellowship

Market Value \$38,967.68

Science Library Endowment

Market Value \$82,320.40

Allan Shelden IV Fellowship

Market Value \$210,536.61

Joseph F. Sherer Memorial Scholarship

Market Value \$86,237.83

Bishop Henry Knox Sherrill Scholarship

Market Value \$296,120.45

Walter J. Sinsheimer Scholarship

Market Value \$193,125.32

Skating Rink Maintenance Fund

Market Value \$383,782.88

The Sabin Smith Fund

Market Value \$94,639.50

Artemas W. Stearns Trust Scholarship

Market Value \$193,770.39

J. Neal Thorne Memorial Athletic Fund

Market Value \$71,129.05

Turner Family Scholarship

Market Value \$189,876.66

Tuttle Family Scholarship

Market Value \$65,986.73

Established in 2003 by gifts from Stephen and Catherine DeSalvo P'06, Elizabeth D. and Keith R. Ellsworth, L. Emerson Tuttle, Jr. '70, and Thomas A. and Harriot T. McGraw P'03, P'06 in honor of their father, Lawrence E. Tuttle '43, P'70, GP'03, GP'06 faculty emeritus (1965—1983), for the purpose of providing financial aid scholarships.

Hope H. van Beuren Chair in Teaching

Market Value \$1,136,229.58

Awarded to Chair of the Science Department and Science Teacher Laura Hajdukiewicz in November 2020.

Visiting Speakers Fund

Market Value \$116,309.57

Charles S. and Frances A. Walker Family Memorial Scholarship

Market Value \$226,966.87

Established in 1989 with a gift from Frances A. Walker P'53, P'55, P'71, GP'94, GP'06 GGP'18 in memory of her husband, Charles S. Walker P'53, P'55, P'71, GP'94, GP'06 GGP'18 and increased thereafter by Robert S. Walker '53, H'66, P'94, GP'18, Daniel A. Walker '55, and C. Stow Walker '71, P'06 in memory of their parents. Annual distributions to be used for financial aid for students with the potential to contribute significantly to the school. First preference is for students whose financial circumstances have been temporarily diminished.

John P. Walsh III Public Speaking Fund

Market Value \$7,660.76

John Hay Whitney Scholarship

Market Value \$714,398.42

F. Fessenden Wilder Faculty Chair in English

Market Value \$711,999.10

Currently held by Dean Charpentier, chair of the English department.

Wilder Speaking Prize

Market Value \$18,428.59

Established in 2000 by a gift from H. Todd Cobey, Jr., Class of 1961, and John G. Cobey, Class of 1962.

Wrestling Program Fund — Coach Discretionary

Market Value \$152,454.17