

Facts About The Gift

- Barbara Dodd Anderson's gift in 2007 was not an outright gift of \$128.5 million. The gift is an irrevocable charitable lead annuity trust (CLAT), which distributes its funds over twenty years.
- George School receives \$5.0 million for each of the first fifteen years until 2022.
- Then George School receives \$10.7 million per year for each of the last five years until the trust terminates in 2026-2027.
- The board of trustees has designated that \$4.9 million of the yearly trust distribution be placed in the endowment to support faculty-staff salaries, financial aid, and other critical aspects of the school. This will provide a permanent income stream to the school at a rate of 4.5 percent of endowment.

As extraordinary as the Barbara Dodd Anderson gift was, it does not and cannot address the school's myriad needs. George School's endowment remains notably smaller than that of peer institutions, and its operating budget—everything from heat to uniforms to financial aid—must be met elsewhere.

That is where the school needs the rest of us. The Annual Fund is a vital source of revenue for the school's operating budget every year. By contributing to the Annual Fund, you ensure that George School will continue to thrive as an extraordinary and diverse community grounded in Quaker values; your generosity is critical to maintaining all that makes the school so special.

To honor Barbara Dodd Anderson's belief in the importance of the Annual Fund and her desire to inspire the generosity of others, the school designates **\$100,000** of her gift to the **Annual Fund** each year.



George School
1690 Newtown Langhorne Road
PMB 4438
Newtown, PA 18940
215.579.6570

The Gift



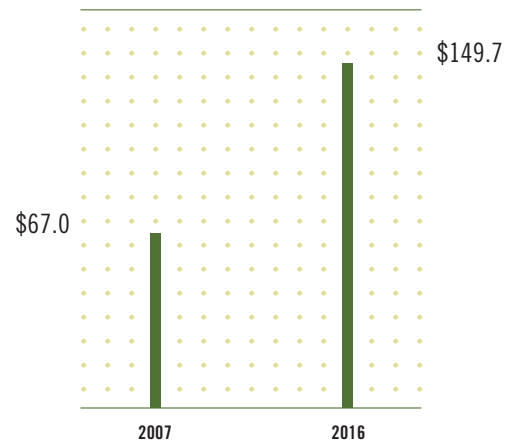
*An Inspired Gift from
Barbara Dodd Anderson '50
Helped an Unpretentious School
Compete at a Higher Level*



Barbara Dodd Anderson '50

In 2007, a grateful alumna made an unprecedented donation to George School: a \$128.5 million charitable lead annuity trust, spread over twenty years. The school has been transformed by her generosity—the campus, the endowment, and faculty and staff, whose salaries now more closely match those of peer institutions.

GEORGE SCHOOL ENDOWMENT
IN MILLIONS

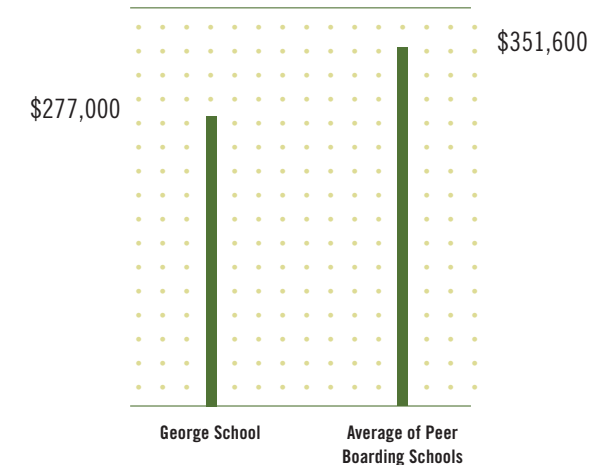


Prior to the Barbara Dodd Anderson gifts, the George School endowment was \$67.0 million. The school's endowment has grown to \$149.7 million in fiscal year 2015-2016. This growth was mostly due to Barbara's trust and investment performance of the entire endowment.

Other Gifts

- Barbara Dodd Anderson gave a gift in 2003 for the redesign and renovation of Main in order to divide the largest dormitory on campus into three separate dormitories.
- In 2006, Barbara provided \$5.0 million as a leadership gift to inspire others to give to a new learning commons and library.
- Barbara's will included an additional unrestricted gift of \$30.0 million. After her death in 2010, the board of trustees directed about half of the proceeds to athletics facilities and the other half to the endowment with the goal of lifting faculty and staff compensation into the top quartile among our group of comparison schools.

ENDOWMENT FUNDS PER STUDENT



The endowment per student at George School based on 2015-2016 data is \$277,000. As impressive as this number may be, we are still lagging behind peer institutions as you can see by the above chart. With a larger endowment we can increase financial aid and enhance the many programs that make the school unique.