

# Guide to the Office of Trusts and Estates, Yale University, Records

RU 960



compiled by Daniel Hartwig

September 2007

Yale University Library  
P.O. Box 208240  
New Haven, CT 06520-8240  
(203) 432-1735  
(203) 432-7441

[beinecke.library@yale.edu](mailto:beinecke.library@yale.edu)

<http://www.library.yale.edu/mssa/>

---

## Table of Contents

Collection Overview .....	3
Requesting Instructions .....	3
Administrative Information .....	3
Immediate Source of Acquisition .....	3
Conditions Governing Access .....	3
Preferred Citation .....	4
Processing Information .....	4
Scope and Contents .....	4
General note .....	4
Arrangement .....	4
Collection Contents .....	5
Accession 2004-A-185: Completed files on individuals' trusts and estates, circa 1940-2004 .....	5
Accession 2005-A-035: Records of completed files on individuals' trusts and estates, 2004 .....	6
Accession 2007-A-007: Records of files closed pre 2003-2005, -2005 .....	7
Accession 2007-A-009: Pooled income fund statements and accounting transfers, 2002-2004 .....	8
Accession 2007-A-010: Charitable gift annuity statements, 2002-2004 .....	9
Accession 2008-A-046: Trust, estate, and gift records, 2007 .....	10
Accession 2009-A-047: Trusts and Estates records, 2007 .....	11
Accession 2009-A-062: Ken Dayton, Oak Leaf Endowment trust files, 1996-2005 .....	12
Accession 2013-A-025: Gift, Bequest, and Life Income records, circa 1971-2010 .....	13
Accession 2008-A-047: Card catalog of treasurer files and other financial records, 1900-2000 .....	14
Accession 2017-A-012: Gift, Bequest, and Life Income records, 1959-2015 .....	15
Accession 2017-A-021: Trusts and Estates records, 1975-2015 .....	16
Accession 2018-A-028: Special assets and donor files .....	17
Accession 2019-A-0014: Trusts and Estates records, 2016-2017 .....	18
Accession 2020-A-0041: Trusts and Estates records, 2018-2019 .....	19
Selected Search Terms .....	20

---

## Collection Overview

**REPOSITORY:** Manuscripts and Archives  
Yale University Library  
P.O. Box 208240  
New Haven, CT 06520-8240  
(203) 432-1735  
(203) 432-7441  
beinecke.library@yale.edu  
<http://www.library.yale.edu/mssa/>

**CALL NUMBER:** RU 960

**CREATOR:** Yale University. Office of Finance and Administration

**TITLE:** Office of Trusts and Estates, Yale University, records

**DATES:** circa 1940-2019

**PHYSICAL DESCRIPTION:** 259.17 linear feet (250 boxes)

**LANGUAGE:** English

**SUMMARY:** The records consist of completed files of individual trusts and estates maintained by the Yale Office of Trusts and Estates.

**ONLINE FINDING AID:** To cite or bookmark this finding aid, please use the following link: <https://hdl.handle.net/10079/fa/mssa.ru.0960>

---

## Requesting Instructions

To request items from this collection for use in the Manuscripts and Archives reading room, please use the request links in the HTML version of this finding aid, available at <https://hdl.handle.net/10079/fa/mssa.ru.0960>.

To order reproductions from this collection, please go to [http://www.library.yale.edu/mssa/ifr\\_copy\\_order.html](http://www.library.yale.edu/mssa/ifr_copy_order.html). The information you will need to submit an order includes: the collection call number, collection title, series or accession number, box number, and folder number or name.

Key to the container abbreviations used in the PDF finding aid:

b.      box  
f.      folder

---

## Administrative Information

---

### Immediate Source of Acquisition

The records were transferred from the Yale Office of Trusts and Estates, 2004-2019.

---

### Conditions Governing Access

Access to the materials is partially restricted. See inventory for details.

Some records in this finding aid have been redacted, as they include student names, donor names, and other restricted data. These records will not appear in the published finding aid.

---

## **Preferred Citation**

Office of Trusts and Estates, Yale University, Records (RU 960). Manuscripts and Archives, Yale University Library.

---

## **Processing Information**

Yale University records are arranged and described at the accession level by the creating office. The University Archives creates collection level descriptive records, but typically does no further arrangement and description at the accession level.

---

## **Scope and Contents**

The records consist of completed files of individual trusts and estates maintained by the Yale Office of Trusts and Estates.

---

## **General note**

Forms part of Yale Record Group 5-B (YRG 5-B), Accounting records and records of the Yale comptroller.

---

## **Arrangement**

The records are arranged by accession.

---

## Collection Contents

### Accession 2004-A-185: Completed files on individuals' trusts and estates, circa 1940-2004

Restricted until Jan 1, 2040

b. 1, f. 13 - 15	Anlyan, A. John (5% CRUT)
b. 2, f. 52 - 53	Blaser, Arthur F. (9% CRUT)
b. 2, f. 72 - 73	Brown, Daniel N. '28 (7% CRAT)
b. 4, f. 136 - 138	Crisler, Richard C. '29 (6% CRUT)
b. 7, f. 249	Hall, Joseph Twichell (8% CRUT)
b. 8, f. 295 - 296	Hixon, Alexander P. '38 (5% CRUT)
b. 15, f. 544 - 546	Ten Eick, Majorie J. (6% CRUT)

**Accession 2005-A-035: Records of completed files on individuals' trusts and estates,  
2004**

Restricted until Jan 1, 2040

**Accession 2007-A-007: Records of files closed pre 2003-2005, -2005**

Restricted until Jan 1, 2041

**Accession 2007-A-009: Pooled income fund statements and accounting transfers,  
2002-2004**

Restricted until Jan 1, 2040



**Accession 2007-A-010: Charitable gift annuity statements, 2002-2004**

Restricted until Jan 1, 2040

## **Accession 2008-A-046: Trust, estate, and gift records, 2007**

Restricted until Jan 1, 2043

Box 28 Folder 351: Jayne, Harold P. & Melgaard, Edna Trusts, has been returned to the Office of Trusts and Estates permanently.

Box 26 Folder 287: Douglas, Richard Alexander Estate, has been returned to the Office of Trusts and Estates permanently.

Box 41 Folder 511: Melon, Paul Estate, has been returned to the Office of Trusts and Estates permanently.

b. 24, f. 224 - 225 Branin, M. Lelyn Grad "27; 7% CRUT

---

b. 24, f. 228 - 229 Brightwell, Henry P. Jr. "35; 8% CRUT

---

**Accession 2009-A-047: Trusts and Estates records, 2007**

Restricted until Jan 1, 2043

**Accession 2009-A-062: Ken Dayton, Oak Leaf Endowment trust files, 1996-2005**

Restricted until Jan 1, 2041

**Accession 2013-A-025: Gift, Bequest, and Life Income records, circa 1971-2010**

Restricted until Jan 1, 2045

**Accession 2008-A-047: Card catalog of treasurer files and other financial records,  
1900-2000**

Restricted until Jan 1, 2036

**Accession 2017-A-012: Gift, Bequest, and Life Income records, 1959-2015**

Restricted until January 1, 2091

**Accession 2017-A-021: Trusts and Estates records, 1975-2015**

Restricted until January 1, 2091



**Accession 2018-A-028: Special assets and donor files**

Office of Origin only

**Accession 2019-A-0014: Trusts and Estates records, 2016-2017**

Restricted until January 1, 2093

**Accession 2020-A-0041: Trusts and Estates records, 2018-2019**

Restricted until January 1, 2095.

## **Selected Search Terms**

The following terms have been used to index the description of this collection in the Library's online catalog. They are grouped by name of person or organization, by subject or location, and by occupation and listed alphabetically therein.

### **Subjects**

Endowments

Gifts

Universities and colleges -- Finance

### **Corporate Bodies**

Yale University. Office of Finance and  
Administration

Yale University -- Benefactors

Yale University -- Endowments

Yale University -- Finance