



Smithsonian

Institution Archives

Treasurer's Records, *circa* 1986-2014

Finding aid prepared by Smithsonian Institution Archives

Smithsonian Institution Archives
Washington, D.C.
Contact us at osiaref@si.edu

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Collection Overview

Repository:	Smithsonian Institution Archives, Washington, D.C., osiaref@si.edu
Title:	Treasurer's Records
Date:	<i>circa</i> 1986-2014
Identifier:	Accession 15-255
Creator::	Smithsonian Institution. Office of the Treasurer
Extent:	
Language:	English

Administrative Information

Preferred Citation

Smithsonian Institution Archives, Accession 15-255, Smithsonian Institution. Office of the Treasurer, Treasurer's Records

Use Restriction

Restricted for 15 years; until Jan-01-2030. Records may contain personally identifiable information (PII) that is permanently restricted; Transferring office; 3/5/2009 memorandum, Yowell to Woltz; Contact reference staff for details.

Descriptive Entry

This accession consists of approximately 65,000 email messages (dated January 2001-January 2014) plus additional electronic files from Sudeep Anand, Treasurer, 1992-2013. Topics documented in this accession include finance, endowments, investments, insurance, and real estate management of the Smithsonian Institution as well as administration of the Office of the Treasurer. In late 2013, the office became part of the Office of Finance and Accounting. Materials predating his tenure as Treasurer were maintained for background or reference purposes. Emails dating after his tenure arrived prior to the account being closed. Materials are in electronic format.

Names and Subject Terms

This collection is indexed in the online catalog of the Smithsonian Institution under the following terms:

Subjects:

- Endowments
- Insurance
- Investments
- Museum buildings
- Museum finance
- Museums -- Administration

Types of Materials:

Electronic mail
Electronic records

Names:

Anand, Sudeep
Smithsonian Institution. Office of Finance and Accounting

Container Listing

Electronic Records	
Electronic Records	Email, January 2001-January 2014
Electronic Records	Miscellaneous files
Electronic Records	A&R Committee - Appropriations and Revenue Committee
Electronic Records	AAA - Archives of American Art
Electronic Records	Annual Audit - FY 2009-FY 2012
Electronic Records	Annual Financial Reports - FY 2009-FY 2012
Electronic Records	Banking
Electronic Records	Burke
Electronic Records	Cardscan Data
Electronic Records	CFO - Chief Financial Officer
Electronic Records	F&I Committee - Finance and Investment Committee
Electronic Records	F&I Committee\Investment Policy Subcommittee
Electronic Records	F&I Committee\Investment Policy Subcommittee\SIC 6-9-05 Meeting - Smithsonian Investment Committee, June 9, 2005
Electronic Records	Facilities
Electronic Records	Financing
Electronic Records	Financing\Discovery Center Refinancing
Electronic Records	Financing\Hazy SBPA Change - Udvar-Hazy Center Standby Bond Purchase Agreement
Electronic Records	Financing\NMAAHC Financing - National Museum of African American History and Culture
Electronic Records	Financing\Trust Balance Sheet and Cash Flows - FY 2010-FY 2012
Electronic Records	Fund Raising

Electronic Records	Fund Raising\Funding from Endowment
Electronic Records	Historical Files
Electronic Records	Historical Files\CHEMICAL
Electronic Records	Historical Files\COMMUTE
Electronic Records	Historical Files\CONSULT
Electronic Records	Historical Files\CORFIN
Electronic Records	Historical Files\FAX1OLD
Electronic Records	Historical Files\FINANCE
Electronic Records	Historical Files\IBBOTSON\DATA
Electronic Records	Historical Files\IBBOTSON\DLL
Electronic Records	Historical Files\IBBOTSON\ENCORR
Electronic Records	Historical Files\IBBOTSON\OPT
Electronic Records	Historical Files\IPMS
Electronic Records	Historical Files\IPMS\BATCH
Electronic Records	Historical Files\IPMS\LIST
Electronic Records	Historical Files\IPMS\MACROS
Electronic Records	Historical Files\IPMS\SMI
Electronic Records	Historical Files\IW
Electronic Records	Historical Files\JOBLET
Electronic Records	Historical Files\MAIL
Electronic Records	Historical Files\MONEY
Electronic Records	Historical Files\NASM - National Air and Space Museum
Electronic Records	Historical Files\NFWF
Electronic Records	Historical Files\NMNH - National Museum of Natural History

Electronic Records	Historical Files\NMNH\RATAG - National Museum of Natural History
Electronic Records	Historical Files\NPM - National Postal Museum
Electronic Records	Historical Files\OPTDEMO
Electronic Records	Historical Files\ORAMEMO
Electronic Records	Historical Files\ORGAN
Electronic Records	Historical Files\PERSONAL
Electronic Records	Historical Files\PERSONAL\JOB
Electronic Records	Historical Files\PERSONAL\LSC
Electronic Records	Historical Files\PERSONAL\NFWF
Electronic Records	Historical Files\PERSONAL\PRINT
Electronic Records	Historical Files\PERSONAL\ROPRINT
Electronic Records	Historical Files\PLANNING
Electronic Records	Historical Files\PRINT
Electronic Records	Historical Files\QUICKENW
Electronic Records	Historical Files\RETIRE
Electronic Records	Historical Files\SAFILE
Electronic Records	Historical Files\SPI
Electronic Records	Historical Files\TC
Electronic Records	Historical Files\TC\BIN
Electronic Records	Historical Files\TC\CLASSLIB\EXAMPLES
Electronic Records	Historical Files\TC\CLASSLIB\INCLUDE
Electronic Records	Historical Files\TC\CLASSLIB\LIB
Electronic Records	Historical Files\TC\CLASSLIB\OBS\DL
Electronic Records	Historical Files\TC\CLASSLIB\OBS\DS

Electronic Records	Historical Files\TC\CLASSLIB\OBJSL
Electronic Records	Historical Files\TC\CLASSLIB\OBJSS
Electronic Records	Historical Files\TC\CLASSLIB\SOURCE
Electronic Records	Historical Files\TC\DOC
Electronic Records	Historical Files\TC\EXAMPLES
Electronic Records	Historical Files\TC\EXAMPLES\TCALC
Electronic Records	Historical Files\TC\INCLUDE
Electronic Records	Historical Files\TC\INCLUDE\SYS
Electronic Records	Historical Files\TC\LIB
Electronic Records	Historical Files\TREASURY
Electronic Records	Historical Files\VALLE
Electronic Records	Inspector General - 2002
Electronic Records	Investments
Electronic Records	Investments\Appaloosa
Electronic Records	Investments\Audit 2006 - Audit, 2006
Electronic Records	Investments\Cerberus
Electronic Records	Investments\Ecofin
Electronic Records	Investments\Economic Forecasts - 2012
Electronic Records	Investments\Farallon
Electronic Records	Investments\Galapagos - 2010
Electronic Records	Investments\Highfields
Electronic Records	Investments\Interesting Articles
Electronic Records	Investments\Investment Guidelines - 2006, 2011
Electronic Records	Investments\Miscellaneous

Electronic Records	Investments\Miscellaneous\James Harris Simons - Wikipedia, the free encyclopedia_files
Electronic Records	Investments\OI Deferred Compensation - Office of Investments
Electronic Records	Investments\Organization
Electronic Records	Investments\Private Equity - 2008
Electronic Records	Investments\Qtr 12-31-06 - Quarterly report, December 31, 2006
Electronic Records	Investments\Qtr Report 3-31-05\Endowment - Quarterly report, March 31, 2005
Electronic Records	Investments\Qtr Report 3-31-06 - Quarterly report, March 31, 2006
Electronic Records	Investments\Qtr Report 6-30-05 - Quarterly report, June 30, 2005
Electronic Records	Investments\Qtr Report 6-30-06 - Quarterly report, June 30, 2006
Electronic Records	Investments\Qtr Report 9-30-05 - Quarterly report, September 30, 2005
Electronic Records	Investments\Qtr Report 9-30-06 - Quarterly report, September 30, 2006
Electronic Records	Investments\Qtr Report 12-31-05 - Quarterly report, December 31, 2005
Electronic Records	Investments\Sequoia Documents
Electronic Records	Investments\Short Term Portfolio
Electronic Records	Investments\SIC 2-28-06 Meeting - Smithsonian Investment Committee, February 28, 2006
Electronic Records	Investments\SIC 9-20-05 Meeting - Smithsonian Investment Committee, September 20, 2005
Electronic Records	Investments\SIC 10-30-06 Meeting - Smithsonian Investment Committee, October 30, 2006
Electronic Records	Investments\TPG-Axon Documents
Electronic Records	Investments\Transition
Electronic Records	IPC - Investment Policy Committee
Electronic Records	MEMOS
Electronic Records	MEMOS\123R5W

Electronic Records	MEMOS\123R5W\LIBRARY\123WXMAC
Electronic Records	MEMOS\123R5W\LIBRARY\TOUR
Electronic Records	MEMOS\123R5W\MAPDATA
Electronic Records	MEMOS\123R5W\MASTERS
Electronic Records	MEMOS\123R5W\PROGRAMS
Electronic Records	MEMOS\123R5W\PROGRAMS\DQAICO
Electronic Records	MEMOS\123R5W\PROGRAMS\DRAWICO
Electronic Records	MEMOS\123R5W\PROGRAMS\GRAPHICO
Electronic Records	MEMOS\123R5W\PROGRAMS\PREVICO
Electronic Records	MEMOS\123R5W\PROGRAMS\SHEETICO
Electronic Records	MEMOS\123R5W\PROGRAMS\TRANSICO
Electronic Records	MEMOS\123R5W\SAMPLE
Electronic Records	MEMOS\123R5W\SAMPLE\DBASE
Electronic Records	MEMOS\123R5W\SAMPLE\MAPS
Electronic Records	MEMOS\123R5W\SAMPLE\SOLVER
Electronic Records	MEMOS\123R5W\SAMPLE\TUTORIAL
Electronic Records	MEMOS\123R5W\SAMPLE\VERSMGR
Electronic Records	MEMOS\ipc - Investment Policy Committee
Electronic Records	MEMOS\NASM - National Air and Space Museum
Electronic Records	MEMOS\NMNH - National Museum of Natural History
Electronic Records	MEMOS\otmemo - Office of the Treasurer memoranda
Electronic Records	MEMOS\personal
Electronic Records	MEMOS\Rating
Electronic Records	MEMOS\RECYCLED

Electronic Records	MEMOS\restate - Real estate
Electronic Records	MEMOS\restate\Victor - Real estate, Victor Building
Electronic Records	nasm - National Air and Space Museum
Electronic Records	nasm\Hazy Financing - National Air and Space Museum, Udvar-Hazy Center
Electronic Records	nams\Hazy II - National Air and Space Museum, Udvar-Hazy Center, Phase II
Electronic Records	New Maroni - Alice Maroni
Electronic Records	New Maroni\Metrics - Alice Maroni
Electronic Records	New Maroni\Regent Papers - Alice Maroni
Electronic Records	New Maroni\Smithsonian Directives - Alice Maroni
Electronic Records	New Maroni\Smithsonian Directives\Advances - Alice Maroni
Electronic Records	New Maroni\Smithsonian Directives\Investments - Alice Maroni
Electronic Records	NMAAHC - National Museum of African American History and Culture
Electronic Records	Nmah - National Museum of American History
Electronic Records	NMNH - National Museum of Natural History
Electronic Records	NPG - National Portrait Gallery
Electronic Records	OPMB - Office of Planning, Management and Budget
Electronic Records	OTFiles\New Folder - Office of the Treasurer
Electronic Records	OTFiles\RESTATE - Office of the Treasurer, Real estate
Electronic Records	otmemo - Office of the Treasurer memoranda
Electronic Records	POB - Patent Office Building
Electronic Records	Qtr Report 3-31-05\Qtr Report 3-31-05\Endowment - Quarterly report March 31, 2005
Electronic Records	Rating
Electronic Records	Rating\Moodys 2013

Electronic Records	Rating\Ratings for 2011
Electronic Records	Rating\Research Reports, 2012
Electronic Records	Rating\S&P 2007 - Standard and Poor's
Electronic Records	Rating\SandP 2012 - Standard and Poor's
Electronic Records	Regents
Electronic Records	restate - Real estate
Electronic Records	restate\Victor - Real estate, Victor Building
Electronic Records	Risk
Electronic Records	Risk\Advances
Electronic Records	SAAM - Smithsonian American Art Museum
Electronic Records	SAAM\Food Service RFP - Smithsonian American Art Museum, Food service request for proposals
Electronic Records	Sale of Securities
Electronic Records	SI Directives - Smithsonian Institution directives
Electronic Records	SI Visitor Count - Smithsonian Institution visitor count, 2011-2013
Electronic Records	Small - Secretary Lawrence M. Small
Electronic Records	Smithsonian Institution
Electronic Records	ST Portfolio
Electronic Records	STRI - Smithsonian Tropical Research Institute