Elite Endowments to Tweak Allocations Amid Tax Hikes

Anne Duggan, CAIA, Managing Director, Client CIO Group at TIFF Investment Management, spoke with reporter Sabiq Shahidullah from FundFire on how large private university endowments are rethinking their investment strategies in response to recent changes to the federal excise tax on endowments. From tax-loss harvesting to rebalancing away from high-turnover strategies, Duggan outlines how even modest tax changes could prompt meaningful portfolio adjustments.

Read the full article

The materials are being provided for informational purposes only and constitute neither an offer to sell nor a solicitation of an offer to buy securities. These materials also do not constitute an offer or advertisement of TIFF's investment advisory services or investment, legal or tax advice. Opinions expressed herein are those of TIFF and are not a recommendation to buy or sell any securities.

These materials may contain forward-looking statements relating to future events. In some cases, you can identify forward-looking statements by terminology such as "may," "will," "should," "expect," "plan," "intend," "anticipate," "believe," "estimate," "predict," "potential," or "continue," the negative of such terms or other comparable terminology. Although TIFF believes the expectations reflected in the forward-looking statements are reasonable, future results cannot be guaranteed.

TIFF Investment Management

July 31, 2025

Copyright © 2026 TIFF Advisory Services, LLC. All rights reserved. May not be reproduced or distributed without permission.