

# Guide to the Assistant Comptroller for Estates, Trusts and Taxes, Yale University, Records

RU 544



compiled by Daniel Hartwig

April 2008

Yale University Library  
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<http://www.library.yale.edu/mssa/>

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## 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 544

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

**TITLE:** Assistant comptroller for estates, trusts and taxes, Yale University, records

**DATES:** 1740-2007

**PHYSICAL DESCRIPTION:** 57.5 linear feet

**LANGUAGE:** English

**SUMMARY:** The records consist of reports, subject files, agreements, tax and audit files, financial statements, and memoranda documenting the operations of the assistant comptroller for estates, trusts and taxes at Yale.

**ONLINE FINDING AID:** To cite or bookmark this finding aid, please use the following link: <https://hdl.handle.net/10079/fa/mssa.ru.0544>

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## 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.0544>.

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

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## Administrative Information

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### Conditions Governing Access

Access to the records is restricted to the office of origin only.

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**

Assistant Comptroller for Estates, Trusts and Taxes, Yale University, Records (RU 544). Manuscripts and Archives, Yale University Library.

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## **Scope and Contents**

The records consist of reports, subject files, agreements, tax and audit files, financial statements, and memoranda documenting the operations of the assistant comptroller for estates, trusts and taxes at Yale.

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## **General note**

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

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## **Arrangement**

The collection is arranged by accession.

## **Collection Contents**

### **Accession 1979-A-021: Records concerning the estates of Olivia C. Hotchkiss and George E. Day, 1905-1909**

Restricted to office of origin only

**Accession 1983-A-079: Tax returns, 1974-1982**

Restricted to office of origin only

Accession 1983-A-116: Materials transferred  
out of previous audit accessions

Assistant comptroller for estates, trusts and taxes, Yale University,  
records  
RU 544

**Accession 1983-A-116: Materials transferred out of previous audit accessions, circa  
1946-1980**

Restricted to office of origin only

Yale University

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**Accession 1985-A-037: Records, 1971-1984**

Restricted to office of origin only

b. 1, f. 4

Yale University Information Return - Form 990

1982-1983

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**Accession 1985-A-038: Wills, 1891-1962**

Restricted to office of origin only

**Accession 1985-A-039: Records, 1980-1983**

Restricted to office of origin only

**Accession 1986-A-095: Tax forms, 1976-1984**

Restricted to office of origin only

**Accession 1988-A-033: Records, 1972-1986**

Restricted to office of origin only

**Accession 1988-A-036: Records, 1720-1977**

Restricted to office of origin only

**Accession 1988-A-048: Estate records, 1930-1983 (bulk 1973-1983)**

Restricted to office of origin only

**Accession 1988-A-093: Records, 1966-1987**

Restricted to office of origin only

**Accession 1989-A-109: Records, 1972-1987**

Restricted to office of origin only



## Accession 2009-A-097: Tax Department records, 2001-2007

Restricted until Jan 1, 2043

b. 2, f. 16	Drama Productions, Inc.	
b. 4, f. 51	Yale Southern Observatory, Inc.	
b. 4, f. 52	Yale Alumni Publications, Inc.	
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b. 6, f. 83	Yale University - State of Virginia	
b. 6, f. 84	Yale University - State of Wisconsin	
b. 7, f. 85	Yale University 2004 Form 990-T - 1 of 2	FYE 6/30/05
b. 7, f. 86	Yale University 2004 Form 990-T - 2 of 2	FYE 6/30/05
b. 7, f. 87	Yale University 2005 Form 990-T - 1 of 2	FYE 6/30/06

b. 7, f. 88	Yale University 2005 Form 990-T - 2 of 2	FYE 6/30/05
b. 7, f. 89	Yale University 2006 Form 990-T - 1 of 2	FYE 6/30/07
b. 7, f. 90	Yale University 2006 Form 990-T - 2 of 2	FYE 6/30/07

## **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**

Universities and colleges -- Finance

### **Corporate Bodies**

Yale University. Office of Finance and Administration

Yale University -- Administration

Yale University -- Benefactors

Yale University -- Finance