

**NEW ENDOWMENT AND/OR RESTRICTED
FUND REQUEST FORM**

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|---|--------------------------|--|--------------------------|---|------------------------|
| Date: | | Email: | | Phone No. | |
| Requestor's Last Name: | | First Name: | | Department: | |
| Fund Request Type: <small>Restricted funds require a minimum of \$1,000 Endowment Funds require a minimum of \$50,000</small> <input type="radio"/> Restricted Account <input type="radio"/> Quasi Endowment <input type="radio"/> Tem Endowment <input type="radio"/> True Endowment <input type="radio"/> Unitrust <input type="radio"/> Other: _____ | | Category: <input type="radio"/> Scholarship <input type="radio"/> Chair <input type="radio"/> Other School/Department: <small>(EX. CHASS, NURSING, SOM, SMD)</small> | | Agreement? <small>Agreements must be signed. Additional support can be emails or memos</small> <input type="radio"/> Yes-Provide Agreement <input type="radio"/> No-Provide Support | |
| | | Exception or a Pledge? <small>(All new fund for Pledges will require a signed agreement)</small> <input type="radio"/> Yes <input type="radio"/> No If Yes, Please explain: | | | |
| Restricted Accounts ONLY <small>(FUND-ORG-ACCT-PROG)</small> Provide Organization No. <small>(For the new fund)</small> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> | | Full Fund Name: If Applicable <hr/> Fund Name--(Max 35 Characters): If endowment please include ENDW in the fund name <hr/> Detail Code Name--(Max 30 Characters): Name that appears on students' statements <hr/> | | | |
| If transferring funds, please provide Fund No. <div style="border: 1px solid black; width: 40px; height: 20px; display: inline-block;"></div> Org No. <div style="border: 1px solid black; width: 40px; height: 20px; display: inline-block;"></div> | | | | | |
| <div style="display: flex; justify-content: space-between;"> <div> Amount: \$ _____ Fund Description/Justification: <small>(Must include the restrictions to the fund)</small> <div style="border: 1px solid black; height: 150px; width: 100%;"></div> </div> <div style="text-align: right;"> Stock Donation: YES <small>(Complete IRS Form 8282)</small> NO </div> </div> | | | | | |
| Responsible Department: | | Requestor Signature: _____ Budget Authority Signature: _____ | | | |
| GRANTS ACCOUNTING ONLY | | | | | |
| <i>Copy Fund:</i> | <i>Copy Detail Code:</i> | <i>Endow Fund #:</i> | <i>Restricted Fund #</i> | <i>Detail Code:</i> | <i>FAID Fund Code:</i> |
| | | | | | |
| <i>Notes:</i> | | | | | <i>Effective Date:</i> |
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