

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

<b>Date:</b>	<b>Email:</b>		<b>Phone No.</b>			
<b>Requestor's Last Name:</b>		<b>First Name:</b>		<b>Department:</b>		
<b>Fund Request Type:</b> <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"/> Term Endowment <input type="radio"/> True Endowment <input type="radio"/> Unitrust <input type="radio"/> Other: _____		<b>Category:</b> <input type="radio"/> Scholarship <input type="radio"/> Chair <input type="radio"/> Other	<b>Agreement?</b> <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	<b>Exception or a Pledge?</b> <small>(All new fund for Pledges will require a signed agreement)</small> <input type="radio"/> Yes <input type="radio"/> No <small>If Yes, Please explain:</small>		
<b>Restricted Accounts ONLY</b> <small>(FUND-ORG-ACCT-PROG)</small>		<b>Full Fund Name:</b> If Applicable  <b>Fund Name--(Max 35 Characters):</b> If endowment please include ENDW in the fund name				
<b>Provide Organization No.</b> <small>(For the new fund)</small> <input type="text"/>		<b>Detail Code Name--(Max 30 Characters):</b> Name that appears on students' statements				
If transferring funds, please provide <b>Fund No.</b> <input type="text"/> <b>Org No.</b> <input type="text"/>						
<b>Amount:</b> \$ _____		<b>Stock Donation:</b>		<b>YES</b> <small>(Complete IRS Form 8282)</small> <b>NO</b>		
<b>Fund Description/Justification:</b> <small>(Must include the restrictions to the fund)</small>       						
<b>Responsible Department:</b>		<b>Requestor Signature:</b> _____ <b>Budget Authority Signature:</b> _____				
<b>GRANTS ACCOUNTING ONLY</b>						
<b>Copy Fund:</b>	<b>Copy Detail Code:</b>	<b>Endow Fund #:</b>	<b>Restricted Fund #</b>	<b>Detail Code:</b>	<b>FAID Fund Code:</b>	<b>Designation Code:</b>
<b>Notes:</b>						<b>Effective Date:</b>