

ADVANCEMENT Advancement Services

Please refer to [PPM 410-5](#) Policy on Timely Expenditure of Endowment Payout and Expendable Gifts for additional information. Completed forms must be submitted to fundstewardship@ucsd.edu or Mail Code 0940.

Endowment Information

Gift Fund (F-xxxx or R-xxxx)	_____	IFIS Fund (e.g. 43000A)	_____
Gift Fund Name	_____		
Annual Payout	_____	Total Balance	_____
Carryforward Amount	_____	Reinvestment Amount	_____

Spending plan/carryforward justification

Principal Investigator _____
Signature _____ Date _____

Dean or Vice Chancellor _____
Signature _____ Date _____

ADVANCEMENT SERVICES USE ONLY

Vice Chancellor (chair funds) _____
Signature _____ Date _____

Donor and Fund Stewardship _____
Signature _____ Date _____

VC-CFO _____
Signature _____ Date _____

Chancellor (chair funds) _____
Signature _____ Date _____

Note: If a request form is not submitted for endowments with accumulated payout balances in excess of 2 years, income will be added back automatically after 90 days following the start of the fiscal year.