

New Gift Fund Information Sheet

Date

[Date input box]

ADVANCEMENT

Advancement Services

Attn: Gift Fund Analyst
9500 Gilman Drive, Mail Code 0940
La Jolla, CA 92093-0940
Phone: (858) 534-0687
Fax: (858) 534-8160

Please note:
Minimum Gift Level to establish a new Current Fund is \$1,000.
Minimum Gift Level to establish a new Endowed Fund refer to PPM 410-4

Name of Fund

[Name of Fund input box]

Legal Entity

[Legal Entity input box]

Foundation: (1) multiple or regularly recurring gifts (pledges) for the same purpose, (2) Endowed gifts, (3) most gifts for capital projects, (4) annual benefits/solicitations/fundraiser events (gifts with quid pro quo)

Regents: (1) a one time gift and the department expects to spend the entire amount within the current fiscal year, (2) gift-in-kind to be added to departmental inventory and not sold.

For planned gifts, real estate or art, please contact Gift Services before requesting a fund.

Internal Use Only (see notes below)
Fund Number
Linked fund
Attribute Required
Documentation Note Required
Not accepting funds

Fund Type

[Fund Type input box]

*copy of gift agreement or solicitation must be attached. Please send original signed agreement to Gift Services at MC 0940

Single or Various Donors

[Single or Various Donors input box]

Do not make visible for online giving

Use

[Use input box]

VC Area

[VC Area input box]

Original Corpus (Endowment Only)

[Original Corpus input box]

Division

[Division input box]

Donor Name, if known

[Donor Name input box]

Department

[Department input box]

Financial Unit # can be obtained from the business officer of the fund. Additional information can be found here: https://esr.ucsd.edu/projects/fis/coa/index.html#Redesigned-Common-Chart-of-Acco

Financial Unit #

[Financial Unit # input box]

Purpose and Restrictions (limited to 255 characters with spaces and punctuation):

[Purpose and Restrictions input box]

Fund owners - default access on STAR and will receive daily gift reports.

Principal Investigator (PI) - Enter the name of the person who will direct the funds for expenditure.

Business Officer (BO) - Enter the name of the person who will be financially responsible for the fund.

PI Name, Email Address, BO Name, Email Address input boxes

Gift Minimum Met, Actively Fundraising input boxes

Special Instructions, if needed:

[Special Instructions input box]

Form Prepared by

[Form Prepared by input box]

Email Address

[Email Address input box]

Save a copy, and attach to a ServiceNow case https://ucsd servicedesk.service-now.com/business-finance

About to: Gift Funds, Related to: Gift Fund Setup & Transfer, More Specifically: New Gift Fund