

New Fund Information Sheet

Date

9500 Gilman Drive, Mail Code 0940
La Jolla, CA 92093-0940
Phone: (858) 534-6385
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

Assigned by Foundation Fund Number

Use	Type
<input type="radio"/> Campus Improvement <input type="radio"/> Department Support <input type="radio"/> Instruction (Endowed Chair) <input type="radio"/> Research <input type="radio"/> Student Support <input type="radio"/> Unrestricted to campus	<input type="radio"/> Endowed Fund* <input type="radio"/> Current Fund to Convert to Endowed* <input type="radio"/> Current Expenditure *copy of gift agreement or solicitation must be attached. Please send original signed agreement to Gift Processing at MC 0940

VC Area

3 Letter Index Prefix

Division

Department

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

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	<input type="text"/>	Email Address	<input type="text"/>
BO Name	<input type="text"/>	Email Address	<input type="text"/>

Gift Minimum Met

Actively Fundraising

Special Instructions, if needed:

Original Corpus (Endowment Only)

Fund Established By (Donor Name)

Form Prepared by

Email Address

Please print this form for your records by clicking "Print Form" before clicking "Submit by Email".

Attention Mac Users: Please print and mail to us at MC 0940