

Date

**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

Legal Entity

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

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

Single or Various Donors   Do not make visible for online giving

Use

VC Area  Original Corpus (Endowment Only)

Division  Donor Name, if known

Department  **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 #

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:

Form Prepared by  Email Address

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