

Hofstra University

Request for New Gift, Endowment, Agency or Plant Fund

Date Requested: _____ Department: _____ Phone: _____ Event Date: _____

Title/Purpose of New Account: _____

Fund Type: _____ Endowment _____ Scholarship
(check one from each column) _____ Restricted _____ Event
 _____ Designated (Unrestricted) _____ Program
 _____ Plant _____ Other (Describe)
 _____ Agency _____

Source of Proceeds: _____

Use of Proceeds: Fund _____ Org _____ Account _____

Name of Fund/Org/Account _____

Use of Proceeds (Purpose): _____

Refundable to Student Non-Refundable to Student Available for Like Term Available for Like Aid Year

Budget to Cover Deficits (if any): Fund _____ Org _____ Account _____

Name of Fund/Org/Account _____

Other Required Documentation

If Gift setup is for an Event, attach an Event Budget, Proposed Donor Deduction, a copy of the invitation, flyer, sponsorship form, etc... and any contracts, if applicable. (please email event budget and proposed donor deduction (using tax deduction calculation form) to the Director for Development Operations)

If Gift setup is for a Scholarship, attach a Scholarship Agreement (copy of signed original or a draft for new scholarship)

Requestor's Signature _____
signature *print name*

Supervisor's Approval _____
signature *print name*

Reviewed: _____ Approved: _____
Assistant Vice President for Development & Alumni Affairs *Vice President for Development & Alumni Affairs*

To be completed by Controllers Office

Banner Fund/Org Number Fund _____ Pred Fund _____ Org _____ Acct _____

Title of Fund _____ Date _____ Initial _____

To be completed by Budget Office

User(s) ID for Banner Access to Fund _____
(who can have access to this fund (enter the user ID))

Fund entered into Banner (Finance Module) Date _____ Initial _____

To be completed by Financial Aid (by type)

/-----Financial Aid-----/ /-----Law School-----/

Fund entered into Banner (F/A Module) Date _____ Initial _____ Date _____ Initial _____

To be completed by Student Accounts

FOAPAL entered into Banner (S/A Module) _____ Date _____ Initial _____

Copies forwarded to:

Budget/Controllers office/Development/Financial Aid, where applicable/Law School., where applicable/Student Accounts, where applicable