



# New Fund Request Form

The Wofford Business Office requires certain information before establishing a new account/fund. The following information must be provided to Brenda McGuire before any fund can be established. Neither pledges nor gifts can be processed until the information is provided.

## PART I Requester and Fund Information

Today's Date:

Name of Development Officer

Fund Name

Type of Gift, as Designated by Donor:

Endowment?  Yes

No (skip to Part III)

## PART II Endowment Detail

If the **endowed fund** is building, indicate when the earnings may be spent (Earliest of):

A. When the fund reaches a minimum dollar threshold of

B. Future Date

*NOTE: Endowment funds will not be available for spend prior to the College's established timeline under any circumstances.*

## PART III Donor Designation

For **all gifts**, please describe the following **DONOR IMPOSED** restriction(s):

(If a signed agreement exists that answers these questions, please attach a copy instead of completing this section).

*Purpose of Gift*

*Time Restriction of Gift*

*Nature of Restriction of Gift*

If there is a restriction and the **donor did not make it**, please explain below:

## PART IV Designation Type and Code Type

Designation Type:

Code Type:

Signature of Development Officer

Date