Endowment agreements are intended to define the purpose of an endowed fund whose principles are agreed upon by the Georgia State University Foundation and the donor.

Scholarship agreements are used for financial support to aid a student at an educational institution in the pursuit of studies. The student may be either an undergraduate or a graduate. Typically, these payments are to be used for educational purposes such as tuition, fees, room and board, books, supplies, and transportation. These funds can be endowed or un-endowed.

Endowment/Scholarship descriptions are internal foundation forms created to document an endowed fund, quasi endowment (aka a fund functioning as an endowment), or scholarship when it is impractical or impossible to identify or contact a donor as a signatory to an endowment agreement.

These documents should be able to withstand the test of time. They should allow flexibility within reason on the part of the university.

I. Official name of endowed fund to be established

(Note: Maximum number of characters allowed by Financial Edge is 60.)

II. Type of document (choose one):

☐ Endowment Agreement
☐ Endowment Description
☐ Scholarship Agreement (non endowment)
☐ Scholarship Description (non endowment)
☐ Memorandum to File
☐ Don’t Know / Not sure

III. Primary donor information

Constituent ID: ____________________ Name: ________________________________________________

List name of Reporting Contact if different from Primary Donor. ____________________________________

For corporations, foundations and other organizations. Please give name of contact and title.

Name ___________________________________  Title ________________________________________

Background information on primary donor and fund (for use in part I of the agreement/description – if you require additional space, please attach a separate document with corresponding numerals.)
IV. Purpose and attributes of fund

Purpose Description (for use in Financial Edge, web sites and university publications)

Type of endowment (choose one)
- [ ] Endowment (Non scholarship)
- [ ] Endowment - scholarship
- [ ] Quasi-endowment
- [ ] Scholarship (non endowed)
- [ ] Don’t know/not sure

Fund/investment type (choose one)
- [ ] Endowed scholarship fund
- [ ] Endowed fund (not scholarship)
- [ ] Un-endowed scholarship

Opportunity Type (choose one)
- [ ] Scholarship
- [ ] Professorship
- [ ] Chair
- [ ] Other __________________________

Benefitting Unit (please list)
________________________________

Department (please list)
________________________________

V. Stewardship

Reporting contact _________________________________

Name: ____________________________________________

Address: __________________________________________

________________________________________________

City: ____________________ State: _____ Zip: ________

Administrative contact (choose one)
- [ ] Dean of college
- [ ] Associate provost, academic programs
- [ ] Athletics director
- [ ] Vice president for student affairs
- [ ] Dean of library
- [ ] Sr. vice president for finance & administration
- [ ] President, foundation
- [ ] Other: ________________________________

Are there any additional reporting requirements (such as detailed reports required by a foundation or corporation)? If so, please explain below.

[Blank space for additional notes]
GEORGIA STATE UNIVERSITY FOUNDATION
Endowment/Non Endowed/Quasi-Endowed Agreement
Endowed Scholarship/Non Endowed Scholarship Agreement

VI. Funding plan

Type of gift(s) - check all that apply
☐ Outright gift ☐ Pledge ☐ Matching Gift ☐ Planned Gift ☐ Other

Please list gift details or funding plan (e.g. terms of pledge, type and duration of planned gift, maximum period for achieving endowment minimum, alternate purpose if endowment minimum is not met within prescribed time period -- if you require additional space, please attach a separate document with corresponding numerals)

VII. Expenditures

Expenditures typical of __________________________________________

Please use the space below to list other or additional expenditures that will be made from spending allocations.

VIII. Attachments – check all that apply

☐ Pledge schedule form, pledge card and/or major gift transmittal
☐ Written proposal
☐ Planned gift transmittal and/or Heritage Society enrollment form
☐ Corporate/foundation grant award letter
☐ Other: ______________________________
☐ Other: ______________________________

IX. Additional information that might be helpful in preparing a draft agreement/description.

Submitted by: _____________________________   Date: ____________________

Please send completed form electronically to:
Elaine McGill
emcgill@gsu.edu