

GEORGIA STATE UNIVERSITY FOUNDATION

Endowment Agreement / Endowment Description Request Form

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

Endowment descriptions are internal foundation forms created to document an **endowed fund** or quasi endowment (aka a fund functioning as an endowment) 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):

- a. Endowment Agreement
- b. Endowment Description
- c. Memorandum to File
- d. 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 than what is provided in this or other text boxes, 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)

- a. Endowment
- b. Quasi-endowment
- c. Don't know/not sure

Benefitting Unit (please list)

Fund/investment type (choose one)

- a. Endowed scholarship fund
- b. Endowed fund (not scholarship)

Department (please list)

Endowment Opportunity (choose one)

- a. Scholarship
- b. Professorship
- c. Chair
- d. Other: _____

FASB (choose one)

- a. Permanently restricted
- b. Temporarily restricted
- c. Don't know/not sure

V. Stewardship

Reporting contact _____

Administrative contact (choose one)

- a. Dean of college
- b. Associate provost, academic programs
- c. Athletics director
- d. Vice president for student affairs
- e. Dean of library
- f. Sr. vice president for finance and administration
- g. President, foundation
- h. Other: _____

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

VI. Funding plan

Type of gift(s) - check all that apply

- ☐ **Outright gift** ☐ **Pledge** ☐ **Matching Gift** ☐ **Planned Gift** ☐ **Other**

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Please list gift details of 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).

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