

GIFT AGREEMENT QUESTIONNAIRE

1. Donor name(s): _____ Advance ID: _____
 Address: _____

2. College or other unit: _____

3. Amount of gift: _____

4. Name of fund to be established (*maximum 100 characters including spaces*):

5. Purpose of gift: During lifetime Part of estate plan
 Endowment Non-endowment

6. Schedule of payments	Amount	Date
Initial gift		
Subsequent gift		
Subsequent gift		
Subsequent gift		
Subsequent gift		
Subsequent gift		
TOTAL		

7. Is a state matching gift anticipated? Yes No

8. Should agreement indicate this is an irrevocable pledge against donor's estate? Yes No

That donor shall include provision in will to cover pledge? Yes No

9. Has this proposal been reviewed by the appropriate manager(s) in accordance with UFF policies? Yes No

10. Is anything being named for a corporate entity? Yes No – Time Limited Permanent

11. If yes, should gift agreement address corporate succession?
 e.g., will fund names be changed if company sold? Yes No

12. Will a physical space (building or part of a building) be named? Yes No

13. Is a College, School, or Department to be named? Yes No

14. Describe any other special features of this gift:

15. Please attach proposal (either formal written proposal, dean's letter, etc., if any):

16. If corporate donor please write name and title of person signing here:

IF DONOR WISHES GIFT TO BE ANONYMOUS, PLEASE COMPLETE THE FOLLOWING:

Okay to send Acknowledgment letters?	Yes	No	
Honor at PC Recognition Event (if applicable)?	Yes	No	
List in PC Recognition Event Program?	Yes	No	
President's Council Mailings:			
Annual PC parking decal mailing	Yes	No	<i>Society Level & above (\$100,000)</i>
Football parking pass requests	Yes	No	<i>Society Level & above (\$100,000)</i>
PC Event invitations	Yes	No	
List gift in Honor Roll of Donors?	Yes	No	
Other mailings			
College mailings	Yes	No	
Focus Magazine	Yes	No	
Today Magazine	Yes	No	

COMMENTS:

Development Officer: _____ Date: _____

What is your Foundation Courier Drop off Location? _____

Please fax this questionnaire to Jennifer at 392-6494

If you have any questions please call Jennifer at 392-5499