Gift Transmittal Form

INTERNAL USE ONLY

DONOR INFORMATION

Name:_____ RE ID _____ ☐ New

Spouse/Partner:_____ RE ID _____ ☐ New

Address:_____ City _____ State _____ ZIP _____

E-mail address:_____ Phone: (_____)_____ Type: ☐ Business ☐ Cell

☐ Extend Soft Credit: Name _____ RE ID: _____ ☐ NEW

☐ **GIFT IS ANONYMOUS**

☐ In Honor of: Name _____ RE ID: _____ ☐ NEW

☐ In Memory of: Name _____ RE ID: _____ ☐ NEW

GIFT INFORMATION

Transaction Type: ☐ Outright Gift ☐ Pledge Payment ☐ New Pledge
(Letter of Commitment/Pledge form must be submitted if a new pledge)

Gift Amount: $_____ Date: _____Type: ☐ Cash ☐ Check ☐ Credit Card ☐ Other

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Credit card number Expiration date Card security code (3- or 4-digit)

Print name on card:_____

Did the donor receive any goods or services for their gift? ☐ Yes ☐ No

If yes, provide description: _____ Fair Market Value: $ _____

DESIGNATION INFORMATION

$ _____ Fund # _____ Fund Name: _____ Appeal ID: _____

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MATCHING GIFT: ☐ Yes ☐ No Company Name _____

IF NEW FUND CREATION IS REQUIRED, CHECK THE CORRESPONDING TYPE BELOW:

☐ **ENDOWMENT – (Draft or Completed)** Endowed Fund Agreement must be submitted to the Foundation

☐ **RESTRICTED – (Draft or Completed)** Restricted Fund Agreement must be submitted to the Foundation

☐ **NAMING – (Draft or Completed)** Naming Agreement must be submitted to the Foundation

☐ **INCOME PRODUCING – Annuity/CRT** Partner with Foundation and Vanguard regarding income producing gift contracts

SPECIAL INSTRUCTIONS

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_____

Development Officer:_____ RE ID:_____

Submitted by:_____ Phone: _____ Date:_____