



UNIVERSITY OF OREGON
FOUNDATION

Gift Agreement: Department Initiated

Prepared by (name)
Department
Contact (if different)

Phone #
Date
Phone #

Copies of donor solicitation materials that demonstrate disclosure of the purpose, as written below, must be attached to this request.

To check box, double click on boxes and select "checked."

Expendable

Capital Date funds to be expended

Interim Deadline for conversion decision *maximum five years*
Interim account requires endowment intention stated in donor solicitation

Quasi Date funds to be expended *requires pre-approval from the Foundation*

Account name:

Purpose:

If interim account, purpose must include timeline for conversion; maximum five years. During this time no expenditures will be allowed; conversion of fund is irrevocable.

Source of funds:

Person(s) authorized to request expenditures:

Administrative Provisions

1. A reasonable fee may be charged by and paid to the Foundation at the time of gift and annually, if endowed, to cover the cost of fundraising and administration of the Fund.
2. In the case of conversion to an endowment, any distribution not expended in a given year may be reinvested in the Fund, as determined by the Foundation.
3. For investment purposes, all or any part of the Fund may be merged with other investment assets of the Foundation and invested at the discretion of the Board of Trustees of the Foundation.
4. Additions to the Fund in the form of assets acceptable to the Foundation may be made at any time by any persons and shall thereafter be subject in all respects to the terms, provisions, and conditions of this Agreement.

5. The Account shall be managed in accordance with applicable laws of the State of Oregon.

Approvals for

Authorized signer

Date

Signature of Dean (if different)

Date

Authorized Signatory
Michael Andreasen
Vice President, Development
University of Oregon

Date

Paul Weinhold
President/CEO
University of Oregon Foundation

Date

UO Foundation Processing

Set up by	IFAS	ADV
Account #	Division #	Department #
Comments		