

**ENDOWMENT AGREEMENT**

**UNIVERSITY OF HOUSTON FOUNDATION**

1535 West Loop South, #450

Houston, Texas 77027

713-622-6061

**1.**

This agreement dated \_\_\_\_\_ between \_\_\_\_\_ and the University of Houston Foundation at Houston, Texas, establishes the \_\_\_\_\_ Endowment.

The endowment will consist of monies bequeathed and/or to be given irrevocably to the University of Houston Foundation (UHF). Minimum funding levels to establish an endowment will be set by the UH Foundation. If the bequest/gift is less than the minimum funding level for an endowment, the bequest/gift will not be endowed and will be used in a way that best matches the donor's original intent.

**2.**

The annual distributed income will be used to: \_\_\_\_\_

(note: please specify criteria)

There will be no distributions for endowments that have a fair market value that is less than the value of the original gift.

UHF will invest and manage the endowment consistent with guidelines established in the UHF Investment Policy. Endowment funds will be pooled for investment purposes.

If, in the judgment of the University of Houston Foundation, circumstances render the above-designated use of this endowment to be impractical, unwise or inappropriate, UHF will use this endowment to further the objectives and purposes of the University of Houston, giving consideration to the special interest of the donor as evidenced by the purpose described above.

UHF will assess a nominal annual fee against the earnings of the endowed fund to offset expenses associated with fund management.

**3.**

(biographical information about the donor(s) can be included in this section)

\_\_\_\_\_  
(Donor signature)

\_\_\_\_\_  
(Donor printed name)

\_\_\_\_\_  
(President, University of Houston Foundation.)

\_\_\_\_\_  
(Date)