

8) Forms/Templates

ENDOWMENT AGREEMENT WORKSHEET

- 1. Name to be given to endowment fund:
- 2. Name of donor(s):
- 3. Is this endowment being made jointly with spouse? yes no If yes, Spouse's name:
- 4. Signatory: _____
- 5. Brief bio on donor or endowment: (Please paste plain text only)

- 6. Type of asset given: (circle all that apply)
 - a. cash b. payroll deduction c. EFT d. real estate
 - e. securities f. other _____

7. Total endowment value: \$ _____ (Click to access the Endowment Calculator)

8. Initial amount given to establish fund \$ _____, on _____ (date)

9. Additional gifts of \$ _____ will be made monthly/quarterly/annually over the next _____ years.

10. Anticipated non-donor funding such as designated or matching funds:

- 11. Designation or restriction of endowment:
 - a. scholarship e. chair
 - b. student fellowship f. distinguished chair
 - c. graduate fellowship g. general program endowment
 - d. professorship h. college professorship
 - i. other _____

12. Criteria for spending annual distributed income:

SUBMITTED BY: _____ (name of Development Director) _____ (date)