

GIFT TRANSMITTAL FORM

DONOR & ALUMNI RECORDS • MAIL CODE DAR-5035 • PHONE (713) 743-8852 • FAX (713) 743-8917

SECTION I

[1] Donor ID (if donor is already in database): _____ Entity Type (if donor is new to database): _____

[2] Donor Name: (Sal.) _____

[3] Contact Person (for Corp, Fdn or Org): _____ Title: _____

[4] Mail Address: _____

[4b] City/State/Zip: _____ Address Type _____

[5] Home Phone: (____) ____ - ____ Business: (____) ____ - ____ Other (____): (____) ____ - ____

[6] Spouse Name: (Sal.) _____ Check box only if donor instructed this is **not** a joint gift:

[7] Personal Email: _____ Business Email: _____

SECTION II

[8] Transaction Type: _____ If payment on existing pledge, indicate pledge number: _____

[9] Is this gift tied to a Proposal number? Y N Proposal number: _____ Campaign Code: _____

Check box only if over \$25K, but considered an Annual Gift:

Check box only if considered a Corporate Annual Gift: (CFR Use ONLY)

[10] Payment Type: _____ [10b] Check Number: _____

Speed Type	Cost Center	Cost Center Name	Purpose Code	Appeal	Amount
[11]					
[12]					
[13]					
[14]					
GIFT TOTAL					_____

[15] If New Pledge: Pledge Amount: _____ Pledge Payment Amounts: _____ Pledge Payment Schedule: _____ First Payment Due On (date): _____

[16] In Memory In Honor On Behalf of: _____

[17] *If in memory/in honor/on behalf of, list the name and address of the person(s) to be notified of this gift in "comments" section on line 20.*

[18] Matching Donor Name (attach claim): _____

[19] For Gifts-In-Kind, indicate value as appraised (attach appraisal) or estimated: _____

[20] Comments (Describe Gift-In-Kind or Other here): _____

SECTION III

[21] Your name (print): _____ Signature/Date: _____

[22] Phone: _____ Mail Code: _____ Campus: _____ College/Unit: _____ Dept: _____

[23] Development Officer Signature: _____ Date: _____

[24] Certifying Signature: _____ Date: _____

[25] INTERNAL USE - MATCHING ID:

Instructions for Gift Transmittal Form

• The Gift Transmittal Form (GTF) is the key document that provides Donor & Alumni Records with information necessary to receipt the donor, apply proper donor recognition credit, feed the university's financial system, record a pledge and correctly capture the donor's giving history for stewardship and reporting. **Please attach to the GTF any donor documentation that accompanied the gift or pledge.** • **All current outright gifts, pledge payments, new pledges, and stock gifts should be processed with a GTF.** Exceptions are if there is a return card (response device) or similar document for the annual fund, an event or fundraising program that contains allocation, appeal and gift purpose information. Such annual fund documents must be pre-certified by the Annual Giving department. All non-annual fund documents must be pre-certified by Donor & Alumni Records. • Estate and deferred gifts, as well as gifts involving bargain sales, charitable lead trusts, family limited partnership interest, life insurance, mineral rights, oil & gas interest, private stock and similar situations, must be reported through the UHS Major Gifts & Planned Giving department which in turn will report the gift information to Donor & Alumni Records.

Line 1/Donor ID: Record the *Advance C/S* identification number of the donor who is to receive the receipt for this gift. If the donor is not already in *Advance C/S*, select the appropriate entity type for creation of the entity in *Advance*.

Line 2/Donor Name: Indicate the donor's preferred salutation, record his/her complete formal name and make note in " " of any nickname or alias.

Line 3/Contact Person: List the primary contact associated with this transaction, not necessarily the CEO or local VP, for Organization donor types.

Lines 4-4b/Address: Include the full address of the donor and select one address type (home, business or seasonal location).

Line 5/Phone: Describe any "other" phone number, such as mobile.

Line 6/Spouse: All gifts by a married donor are made joint with the spouse receiving 100% soft credit (donor recognition) unless the donor provides specific instructions otherwise. Include the spouse's name even if the gift is not "joint."

Line 7/Email Address: If known, enter the donor personal and/or business email address.

Line 8/Transaction Type: Select one transaction type. You may report both a new pledge and an accompanying initial payment together on the GTF; however, there is no need to complete "pledge" information on line 15 when a pledge payment is made for an existing pledge. Private Grants and Private Grant Installments refer to research gifts deposited in Cost Centers with Fund values beginning with "4" and should be treated as gifts and pledge payments respectively. If this transaction is actually a payment on an existing pledge, indicate pledge number.

Line 9/Gift tied to Proposal: Indicates if the gift is linked to a proposal by checking yes or no. Write Proposal Number and/or Campaign Code
• Indicates if the gift is an Annual Gift by checking the box. • Indicates if the gift is considered a Corporate Annual Gift by checking the box (CFR Use Only).

Line 10-10b/Payment Type: Please indicate the method of payment of this gift: check, credit card, cash, etc. If the gift is a check please indicate the check number in the space provided. • Other property includes equipment, software, food, printing, etc. Personal property includes art, jewelry, etc. Gifts involving bargain sales, charitable lead trusts, family limited partnership interest, life insurance, mineral rights, oil & gas interest, private stock, real estate and similar situations should be reported through the Major Gifts & Planned Giving department. **Note: If gift or pledge is over \$25,000 but considered an annual gift, check this box. If corporate annual gift, check other box.**

Lines 11-14/Gift Information: Itemize multiple allocations for a **single** gift on lines 11-14. • Enter the PeopleSoft Speed Type, Cost Center & Cost Center name into which Treasury will deposit the gift. • List the gift purpose (i.e. Endowed Scholarship; Operations-Library; etc.) based on the official list published by the UHS Office of Development. • Include "appeal code" (if applicable) which should be requested through UASYS (UHS University Advancement Intranet) prior to solicitation. • For gifts of stock, list the number of shares and company name(s) in the comment section on line 20. **Quid Pro Quo:** When there is a QPQ (dinner, auction item, premium, etc.) associated with a gift, list the fair market value of the item per UHS guidelines under "Amount" on line 13 and describe the QPQ in the comment section on line 20. If the amount of the QPQ is to be credited to a separate cost center, enter that value on cost center on line 14.

Line 15/Pledge Information: Complete these lines when there is a new pledge, not for a pledge payment on an existing pledge. It is possible to report both a new pledge and first pledge payment on the same GTF. Be sure to include the total amount of the pledge, amount of the payments, the subsequent payment schedule (monthly, quarterly, annually, etc.), and the date first payment will be due.

Line 16 & 17/Memorials & Tributes: When a gift is in memory, in honor of, or on behalf of someone, list the name of the honoree. Also, list the name and address of the person(s) to be notified about this gift (i.e. notify Mrs. Jane Doe, at *XYZ address*, of gifts in memory of her late husband) in the comment section on line 20.

Line 18/Matching Gift: List the name of the matching company when a donor submits a matching claim with their gift and **be sure to attach the claim to the GTF.**

Line 19/GIK Value: Gifts valued at \$5,000 or more generally must have a qualified independent appraisal stating the value (see UHS guidelines). For gifts less than \$5,000 or when there is no appraisal, list the value as stated by the donor, development officer or a faculty/staff member. Be sure to attach a copy of the appraisal or other supporting documentation to the GTF.

Line 20/Description & Comments: Use these lines as described in other sections of this document and/or to list any special comments or instructions related to the gift or pledge. Please do not exceed a total of 5 lines in order to keep the GTF to one page.

Lines 21-25/ Submitter's Information: Type or write your name. Sign and date the form and include your phone number and mail code. Indicate campus (UH, UHCL, UHD, UHV or UHSA), College/Unit (Athletics, Education, Library, etc.) and Department to which the gift was made. • **DO**

Signature and Date: The development officer assigned to the college, unit, or department receiving the gift should sign the GTF prior to being submitted to Donor & Alumni Records when the gift is valued at \$5,000 or more or is other than cash/checks/credit cards. It is preferred that the

development officer sign whenever possible for all gifts. • Certifying **Signature and Date:** Person with certifying signatory authority for PeopleSoft Cost Center must sign all GTF's.