For Foundation Use Only:

Fund #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Radford University Foundation, Inc.

Fund Maintenance Request Form

Fund Maintenance Requested by: Request Date:

Requestor Position/Title: Campus PO Box: Campus Phone:

Mark One: Create Fund: [ ]  Update Fund: [ ]  Deactivate Fund: [ ]

College and/or Affiliated Program:

Guardian of Fund (list position, not person’s name):

(If different than requestor)

Fund Name:

Updated from Fund Name (if applicable): Fund Number (if known): Designation Name (if known):

Endowed Fund: Yes: [ ]  No: [ ]  If Yes, endowment level:

*Note: Endowment funds will have 2 funds established: one for the endowment (corpus & earnings) and one for the annual spending. If donations are received for current spending, a separate designation will be established to track that activity.Additionally, if funds will be received from fundraising events, designations may be created to track that activity.*

Income Received from: Donations: [ ]  Other Sources: [ ]  Both: [ ]

**Purpose or Activity of the proposed fund (must be completed to document the restrictions placed on fund, unless approved gift agreement is attached (preferred for endowments)** [ ] **): Additionally, explain why any of the current funds would not work for any new fund requests.**

**Any special requirements of the fund (must explain any “Other Sources” of income here (including Events), and explain if fund is considered a “term” fund with an assumed “end date,” typically seen with project and pass-through scholarships):**

I RECOGNIZE THAT MY ADMINISTRATIVE POSITION GIVES THE AUTHORITY TO ACT AS A STEWARD OF THE ABOVE NAMED FOUNDATION FUND AND GIVE MY APPROVAL FOR THE CREATION AND ADMINISTRATION OF THIS FUND BY THE RADFORD UNIVERSITY FOUNDATION, INC.

Approved by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Dean of College (required for all academic funds)

 Signature Date

Approved by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Provost (required for all academic funds)

 Signature Date OR

 Vice President (non-academic funds)

Approved by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_University President or Designee (athletic funds only)

 Signature Date

***\* Forms related to Foundation Operations must be signed by the Foundation Controller or Executive Director.***

For Foundation Use Only:

Fund Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Maintenance Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spendable Fund Required? [ ]  Event Designation Required? [ ]  Membership Designation Required? [ ]

Fund Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Spendable Fund Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Org Code: \_\_\_\_\_\_\_\_\_\_\_ Program Code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Updated: FRAGRNT: [ ]  or N/A FTMFUND: [ ]  FNMENDW: [ ]  or N/A FTMFBAL: [ ]  or N/A ADADESG: [ ]

COE on File (must be for endowed funds): [ ]  Advancement Designation (s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Approved by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 CEO, Controller or Authorized Officer of the

 Radford University Foundation, Inc. Form Updated 5/2018