Instructions for Completing the University of Alaska Foundation Gift Agreement

Per UA Foundation Policy and Procedures [I.9 Procedures for Establishing New Funds](#) the Gift Agreement(GA), adopted in July of 2006 is required for the establishment of all new named and endowed funds. See link for additional information.

**NAME OF NEW FUND**

Use the following guidelines and examples:

- **Do not use “Fund”, “Account” or “Endowment” in the fund name.**
- **MAXIMUM 50 characters including spaces**

  Community and Technical College Scholarship
  Ardell French Memorial
  Alaska Quaternary
  U of A Museum

- **Use “and” rather than the ampersand (&) in fund names**

  Iver and Cora Knapstad Scholarship
  Language and Comparative Literature

**DONOR(S)/FUND ORIGINATOR** – Fill in the name/address/phone/email.

*(example Donor)*
Joseph B. and Shirley K. Benefactor, 12345 Donation Way, Campaign Town, NJ 00256; 555-555-5555; jsb@donate2u.com.

*or*

*(example Fund Originator)*
Iam Dean, Director, School of Education, University of Alaska Anchorage, 3220 Providence Dr., Anchorage, AK 99508, 786-555-5555, idean@uaa.alaska.edu.

**RECOGNITION NAME** - Fill in if different from Donor Name otherwise delete.

*(example)*
Joe and Katherine Benefactor

**Note:** the following sentence should stay in the form as an option for the donor either under RECOGNITION NAME or under DONOR(S) if RECOGNITION NAME is deleted
Please check here ___ if you wish to remain anonymous and we will not list you in publications or other recognition vehicles.

GIFT AMOUNT/ ORIGIN OF GIFT AND AMOUNT (Fund Originator GA only)

(example - GA)
$1,000,000.00

If a pledge fill in as indicated, otherwise delete complete sentence.
(example)
Pledge to be paid in 10 installments of $100,000 each annually beginning July 1, 2007.

or

(example – Fund Originator GA)
$1,000,000.00 from United Donors to You

WHEREAS – Make appropriate choices as indicated.

1. INTENT

FILL THIS AREA IN WITH THE DONOR’S PURPOSE AND INTENTIONS WITH THE MINIMUM INFORMATION TO ENSURE DONOR INTENT.

Purpose (Why the money is being given.):

Example(s):

A. To provide scholarships to students attending the University of Alaska Anchorage.

B. To provide funds in support of the Graduate School at UAF.

C. To support landscaping and beautification at the University of Alaska Southeast.

D. To provide monetary recognition to an outstanding student or faculty member at the University of Alaska Anchorage.
Qualifications (How the money is to be distributed)

If a donor specifies particular qualifications pertaining to the scholarship/award recipient(s) the following can be added to the GA. Otherwise, if a donor does not specify certain qualifications, leave off GA and the information on Page 2 of the NPSUF will default to standard criteria (i.e. Minimum GPA to receive financial aid is 2.0, required status of enrollment is either full-time or part-time).

Example(s):

A. Recipient(s) must be a full-time sophomore majoring in economics with a minimum 3.75 GPA and have graduated from an Alaska high school.

B. Must be a student or faculty member associated with the English Department. Students must be a junior or senior with a minimum GPA of 3.0. Faculty must be tenured.

2. USE - Fill in appropriate campus, school, department as indicated.

3. MANAGEMENT - No Selection/Change Necessary

4. ADDITIONAL GIFTS - No Selection/Change Necessary

5. REDIRECTION – Make appropriate choices as indicated.

6. GOVERNANCE - No Selection/Change Necessary

7. DATE EFFECTIVE - No Selection/Change Necessary

SIGNATURES:

[Donor Name/Fund Originator] Date
(example) Joseph B. Benefactor/Iam Dean, Director UA Department

[Donor Name/Fund Originator] Date
(add more signature lines if more than two or delete if only one)
(example) Shirley K. Benefactor/Iam Dean, Director UA Department

UNIVERSITY OF ALASKA:
By: [Name, Title (President, Chancellor, Dean, Chairperson)] Date
(example) Iam Dean, Director UA Department

UNIVERSITY OF ALASKA FOUNDATION:
By: ________________________________ Date
Mary Rutherford, President