



New Fund Questions

Type of fund (circle one from both A and B):

A. Field of Interest Designated Agency Scholarship Donor Advised

B. Endowed Pass-through

Name of fund _____

Purpose of fund _____

Initial amount of gift \$ _____

Type of initial gift (circle one): Cash Securities Real Estate Other _____

Donor(s) _____

Advisor(s) _____

Successor(s) _____

Donor address _____

Phone _____

E-mail _____

Miscellaneous _____