

**Gift Reporting and Transmittal Form**  
**University Form**  
 California State University, Fresno  
 March 2000

California State University, Fresno  
 Office of University Development  
 Advancement Services

Keats Campus Building, Room 101, M/S KC45  
 Phone: 278-4036 / Fax: 278-7925  
<http://129.8.21.20>

**GIFT REPORTING AND TRANSMITTAL FORM (GRT)**

- Please complete and send GRT and check(s) to Office of University Development. (Keep a copy for your records.)
- Attach copies of GRT and check(s) along with relevant information (e.g., correspondence, envelope, acknowledgement letters, etc.).

**I. DONOR INFORMATION**

<input type="checkbox"/> Alumni <input type="checkbox"/> Friend <input type="checkbox"/> Parent of current student <input type="checkbox"/> Corporation <input type="checkbox"/> Foundation				
Name:			Phone:	
Address:			Fax:	
City/State/Zip:			Email:	
I.D. number required:		Appeal Code:	Spouse:	

**II. DONOR EMPLOYMENT/BUSINESS INFORMATION**

Job title:		Phone:
Organization: <input type="checkbox"/> Matching gift company		Fax:
Address:		Email:
City/State/Zip:		Contact:

**III. GIFT INFORMATION**

Date received:		Amount required: \$	Tax deductible amount: \$
Purpose as stated by donor:		<input type="checkbox"/> Check <input type="checkbox"/> Credit card <input type="checkbox"/> No checks attached	<input type="checkbox"/> Joint gift (husband/wife)
		<input type="checkbox"/> Joint gift (husband/wife)	<input type="checkbox"/> Joint gift (husband/wife)
		<input type="checkbox"/> New pledge	<input type="checkbox"/> Existing pledge. <input type="checkbox"/> Original amount \$
If memorial gift, please provide survivor address:		<input type="checkbox"/> Gift-in-kind:	<input type="checkbox"/> Real estate <input type="checkbox"/> Equipment <input type="checkbox"/> Securities (complete gift information on back) <input type="checkbox"/> Other (specify):
		<input type="checkbox"/> Matched gift:	<input type="checkbox"/> Gift to be matched <input type="checkbox"/> Match form attached <input type="checkbox"/> Matched by: <input type="checkbox"/> Amount \$
In memory of:			

**IV. GIFT DESIGNATION**

Where gift will be deposited required: <input type="checkbox"/> Foundation <input type="checkbox"/> Ag Fdn <input type="checkbox"/> Ag One <input type="checkbox"/> Athletic Corp <input type="checkbox"/> Bulldog Fdn <input type="checkbox"/> Alumni Assoc. <input type="checkbox"/> University							
School/unit:				Account name:			
Department:				Account number required:			
If gift requires special handling, explain:							

**V. GIFT ACKNOWLEDGEMENT**

Donor approached by:		Acknowledgements sent to:	
Acknowledged by:			

Date prepared:		Prepared by:	
School/unit:		Phone:	Fax:      M/S#:

**VI. For Office of University Development Use Only**

All required letter(s) of acknowledgment have been sent? <input type="checkbox"/>		Date Received:
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(See additional information on reverse side. If you need further assistance, please contact the Office of University Development.)

Rev. 3/00

**GIFT REPORTING AND TRANSMITTAL FORM (GRT)**  
 (How to Complete Information)

**I. DONOR INFORMATION**

- ALUMNI ■ FRIEND ■ PARENT ■ CORPORATION ■ FOUNDATION: Check which best identifies donor.
- NAME: Enter name as it appears (printed) on check. This is where gift will be credited to.
- ADDRESS: Enter most current and complete address and include 9-digit Zip Code.
- SPOUSE: Enter spouse's name and salutation (e.g., Mrs. Mary J. Smith).
- I.D. NUMBER required: Enter donor's identification number.

**II. DONOR EMPLOYMENT/ BUSINESS INFORMATION**

- JOB TITLE: Enter donor's affiliation with business (e.g., owner, president, CEO, associate). If retired, enter "retired"
- ORGANIZATION: Indicate if it's a matching gift company (employer).
- ADDRESS: Enter business address and mailing address if different.

**III. GIFT INFORMATION**

- DATE RECEIVED: Enter date gift was received.                      ■ AMOUNT required.                      ■ TAX DEDUCTIBLE: Enter legal amount
- PURPOSE: Give donor's request for gift. Indicate if there are any restrictions on gift or pledge.
- MEMORIAL GIFTS: Provide survivor name and address.
- CHECK/CREDIT CARD: *Visa* and *Master Card* are accepted.
- JOINT GIFT: Check if gift is from husband and wife. Indicate if gift is to be divided in equal amount(s).
- PLEDGE If gift is a pledge payment, enter original amount.
- GIFT-IN-KIND: Complete and attach "Gift-In-Kind Acceptance Form", "Tax Form 8283" gifts \$501 and up; donor appraisal *required* gifts \$5,001 and up. (Forms and policy statements can be obtained from the Office of University Development.)

■ SECURITIES: Please complete information below:		Entries:
Mean value on date of delivery: \$	Date:	\$
Proceeds upon liquidation/date: \$	Date:	Debit:
Broker's check deposited by:		Credit:

- MATCHING GIFTS: Enter amount of matching gift and attach original matching gift form. ("Institution Section" on matching gift form will be completed by CSUF Foundation). Matching gifts are placed in the same account as the original gift unless restricted by company or university policy.

**IV. GIFT DESIGNATION**

- ACCOUNT NAME: Enter official name of account and be specific. (Accounts may have multiple names.).
- ACCOUNT NUMBER: Enter all digits of account code.

■ Here are a few examples of how to provide correct account names and numbers.

Account Name: SCOP SCHOLARSHIP FUND/SE ASAIN-DONATIONS  
 Account Number: 32284.9108.1

Endowment Accounts\*  
 Account Name: Uninvested Capital Account  
 Account Number: 3.1490.21  
 \*All endowments are deposited into "Uninvested Capital Account".  
 Indicate if NEW endowment because a person may have more than one endowment account.

Account Name: Scholarships  
 Account Number: 31015.9108.XXXXX  
 (31015=scholarship; 9108=donation; XXXXX designates specific scholarship.)

- SPECIAL HANDLING OF GIFTS: Provide explanation (e.g., donor wishes to remain anonymous.)
- GIFT DEPOSIT required: Check organization where gift will be deposited.

**V. GIFT ACKNOWLEDGEMENT**

- DONOR APPROACHED BY: Indicate how/who approached donor (e.g., approached by Dean, Development Officer; mailings.)
- ACKNOWLEDGED BY: Attach copy of acknowledgement letter.
- GIFTS: All gifts acknowledged by Assoc. VP for Advancement; gifts \$1,000+ acknowledged by VP for Advancement; gifts \$5,000+ acknowledged by President.
- GIFTS-IN-KIND: Acknowledged by President