INSTRUCTIONS FOR COMPLETING THE GIFT TRANSMITTAL FORM
- ORGANIZATIONS -

Gift Designation Information
- If the gift is to an existing fund, indicate the amount, the allocation code, and the corresponding budget number. The allocation code is the six-letter abbreviation for the fund allocation, which may be identified using the allocation look-up in the Advance system.
- If the gift is to a new budget that does not yet exist in the Advance system please be sure to include a completed Request for New Gift Budget form.
- Designation may be made to more than one area.

Anonymity
Please indicate one of the following if the gift is to be anonymous:

1. Publications Exclusion - Select this option for donors who desire to have their name omitted from all publications listing donor participation. This option will replace the donor name with "Anonymous" for all gifts listed under a donor’s giving history.
2. "Anonymous" Profile - Donor’s gift is entered into Advance under an "Anonymous" entity. Select this option if the donor wishes to remain completely anonymously for a specific gift. Any gift reports will simply identify the donor name as "Anonymous". This level prohibits the system from providing automatic credit for giving clubs, generating pledge reminders, crediting the donor’s giving summary, or sending tax receipts. (Receipts for these gifts can be generated manually upon request.)

Restrictions
If the gift is restricted for a specific purpose, give a brief description in the space provided. Attach all supporting documentation.

In-Kind Gift
For in-kind gifts, provide a description in the space provided of all items and note the valuation. Values reported must be substantiated by attached documentation. Recent bills of sale or independent expert appraisals are acceptable. Where substantiating documents are unavailable, indicate that the value is unassigned. Appraisals made by university personnel are unacceptable because the University is party to the transaction. For gifts of equipment donated by the manufacturer, documentation from the corporation’s financial office may be used. In-kind gifts should be acknowledged by the receiving department with a description of the gift, but should not include a confirmation of value on the acknowledgment itself.

In Honor or Memory
If the gift is in honor or memory of an individual, please check the correct box and name that person in the space provided. These gifts require special acknowledgment, which is the responsibility of the receiving unit and/or area development office.

Form Prepared and Submitted for Acceptance By
The name of the form preparer, their department, Box Number, and phone number are required by GP. Your Department or Development Office may require additional signatures as follows:
Required for gifts under $1,000, signature of the Department Chair, Director or Fund Administrator; for gifts of $1,000 or more, the signature of the area Development Director, Dean, Vice President, or a representative.