

**New Fund Form**

Please provide the following information to Foundation Accounting when opening a new fund:

Fund Name: Click or tap here to enter text. RE Fund ID:Click or tap here to enter text.

 (Provided by Foundation Accounting)

Primary Donor:Click or tap here to enter text. Donor RE:Click or tap here to enter text.

 (Organization or individual credited with gift)

**Choose Fund Category:** Choose an item. **Choose Fund Type:** Choose an item.

**Managed by:** Choose an item.

**Gift Information**

Initial Amount Contributed: Click or tap here to enter text. Date of gift: Click or tap to enter a date.

Does this fund have a pledge attached? [ ] No [ ] Yes

If yes, provide payment schedule: Please see attached agreement.

Purpose of Fund: Click or tap here to enter text.

Allowable expenses paid from fund (i.e. program costs, tuition, books): Click or tap here to enter text..

Foundation Contact: Choose an item.

 **Personnel Authorized to Request Disbursements from this Fund:**

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 David A. Rutherford, M.A, CFRE Date

Vice-President of Institutional Advancement and

CEO, The Foundation for Palm Beach State College