



Form 2203 FR.06
Request to Close Spendable Gift

Revised 11/5/2019

Instructions: This form should be used by departments to request the closure of a spendable gift. A spendable gift may be closed when the balance is zero and no future gifts are anticipated for the purpose for which the gift was originally established.

A spendable gift with an unspent balance may also be closed when the purpose for which the gift was originally given has been fulfilled. Any remaining balance will be used to offset the requesting department's General Appropriations funding. Requests to close a gift with an unspent balance must be approved by the department's appropriate lead administrator.

Gift Information			
Please Indicate:	<input type="checkbox"/> Single closed gift request (fill in information below)		<input type="checkbox"/> Multiple closed gift request (use attached Page 2)
Name of gift to be closed:			
Gift #:		Gift balance, per Account Balance Report:	\$
Reason gift is being closed:			

If gift balance is not \$0.00, provide instructions for transfer of remaining balance (must be an unrestricted fund):

Charging Instructions	
Company	
Yale Designated	
Grant	
Gift	
Cost Center	
Program	
Project	
Spend/Revenue Category	
Ledger Account	
Location	
Assignee	

Requester Information			
Requester Name:		Email Address:	
Requesting Department:		Campus Phone:	
Requester Signature:		Date:	

Approval of Request			
Approved by:		Email Address:	
Title:		Campus Phone:	
Approver Signature:		Date:	

If Deputy Provost approval is required, submit form and any supporting documents to the Provost Lead Administrator, who will determine COA instructions by which remaining balance will be transferred, will obtain Deputy Provost approval, and will submit completed form. All others, submit completed form and any supporting documents to: giftawards@yale.edu. Gift Accounting will notify you via e-mail when the spendable gift is closed.

Prior to submitting this form for closure to Gift Accounting, departments must complete the following steps:

1. Verify that all designations linked to the Gift have been closed by contacting Contribution Processing at gift.designations@yale.edu
2. Verify that there are no gift balances, assets, liabilities, or commitments at the COA level (Account Holder report)
3. Send any appropriate Chart of Accounts closing documentation to coa@yale.edu

