



Form 2203 FR.08

YSM - Request to Set-Up or Add to a University Fund Functioning as Endowment (UFFE)

Revised 11/5/2019

For YSM use only

Instructions: In accordance with Policy 2203, the minimum amount for which a new UFFE may be established is \$100,000, and the expectation is that the gift will remain invested in the endowment for at least ten years. This form must be completed and authorized by the University's Provost before being submitted to Gift Accounting for processing.

New UFFE

Addition to existing UFFE

Gift # _____

Proposed name of new UFFE (or name of existing UFFE for additions):
Reason for and/or purpose of new UFFE:

Dollar amount to be transferred to new UFFE or added to existing UFFE (minimum of \$100,000 for a new UFFE): \$

Table with 2 columns: Proceeds to be transferred from: (Company, Yale Designated, Gift, Cost Center, Program, Project, Location, Assignee, Fund ID, Recovery Flag)

Table with 2 columns: Proceeds to be transferred to: (Company, Yale Designated, Gift, Cost Center, Program, Project, Location, Assignee, Fund ID, Recovery Flag)

Requester Information section with fields for Requester Name, Department, Signature, Email Address, Campus Phone, and Date.

Approval of Request by Deputy Dean for Finance or Dir. YSM Central Administration section with fields for Approved by, Title, Signature, Email Address, Campus Phone, and Date.

Authorization of Request by Provost section with fields for University Provost Signature and Date.

Requester: Submit form to YSM Central Administration (100 CSS Suite 100), who will submit to Dean's Office for approval.

Dir. YSM Central Admin. to submit completed form and any supporting documentation to: giftawards@yale.edu

Gift Accounting, Office of the Controller, 25 Science Park, 150 Munson Street, New Haven, CT 06511