



Form 2203 FR.08

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

Revised 6/2/2017

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):

\$

Funding to be transferred from:

Table with 2 columns: Label (Company, Yale Designated, Grant, Gift, Cost Center, Program, Project, Spend/Revenue Category, Ledger Account, Location, Assignee) and Value.

Requester Information table with fields: Requester Name, Requester Signature, Requesting Department, Email Address, Campus Phone, Date.

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

Authorization of Request by Provost table with fields: University Provost Signature, 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