



Form 2203 FR.09

YSM - Request to Decapitalize an Existing University Fund Functioning as Endowment (UFFE)

Revised 6/2/2017

For YSM use only

Instructions: In accordance with Policy 2203, this form must be completed and authorized by the University's Provost before being submitted to Gift Accounting for processing.

Name of UFFE to be decapitalized: \_\_\_\_\_

Gift #: \_\_\_\_\_

Reason why decapitalization is being requested:

Date by which distribution requested: \_\_\_\_\_
(Since endowment units must be redeemed (sold) to decapitalize a UFFE, please allow up to six weeks for the decapitalization to be completed as endowment unit market values are only calculated quarterly.)

Is complete decapitalization and closing of UFFE being requested?

YES

NO

Dollar amount to be withdrawn from UFFE:

\$ \_\_\_\_\_

Withdrawal to be transferred to:

Table with 2 columns: Charging Instructions, and a blank column for input. Rows include Company, Yale Designated, Grant, Gift, Cost Center, Program, Project, Spend/Revenue Category, Ledger Account, Location, Assignee.

Requester Information section with fields for Requester Name, Signature, Department, 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