

For Foundation Use Only:

Fund #: _____

Radford University Foundation, Inc.
Fund Maintenance Request Form

Fund Maintenance Requested by: _____ Request Date: _____

Requestor Position/Title: _____ Campus PO Box: _____ Campus Phone: _____

Mark One: Create Fund: Update Fund: Deactivate Fund:

College and/or Affiliated Program: _____

Guardian of Fund (list position, not person's name):
(If different than requestor)

Fund Name: _____

Updated from Fund Name (if applicable): _____ Fund Number (if known): _____ Designation Name (if known): _____

Endowed Fund: Yes: No: If Yes, endowment level:

Note: Endowment funds will have 2 funds established: one for the endowment (corpus & earnings) and one for the annual spending. If donations are received for current spending, a separate designation will be established to track that activity. Additionally, if funds will be received from fundraising events, designations may be created to track that activity.

Income Received from: Donations: Other Sources: Both:

Purpose or Activity of the proposed fund (must be completed to document the restrictions placed on fund, unless approved gift agreement is attached (preferred for endowments)): Additionally, explain why any of the current funds would not work for any new fund requests.

Any special requirements of the fund (must explain any "Other Sources" of income here (including Events), and explain if fund is considered a "term" fund with an assumed "end date," typically seen with project and pass-through scholarships):

I RECOGNIZE THAT MY ADMINISTRATIVE POSITION GIVES THE AUTHORITY TO ACT AS A STEWARD OF THE ABOVE NAMED FOUNDATION FUND AND GIVE MY APPROVAL FOR THE CREATION AND ADMINISTRATION OF THIS FUND BY THE RADFORD UNIVERSITY FOUNDATION, INC.

Approved by: _____ Signature _____ Date _____ Dean of College (required for all academic funds)

Approved by: _____ Signature _____ Date _____ Provost (required for all academic funds)
OR
Vice President (non-academic funds)

Approved by: _____ Signature _____ Date _____ University President or Designee (athletic funds only)

*** Forms related to Foundation Operations must be signed by the Foundation Controller or Executive Director.**

For Foundation Use Only:

Fund Name: _____ Maintenance Date: _____

Spendable Fund Required? Event Designation Required? Membership Designation Required?

Fund Number: _____ Spendable Fund Number: _____ Org Code: _____ Program Code: _____

Updated: FRAGRNT: or N/A FTMFUND: FNMENDW: or N/A FTMFBAL: or N/A ADADESG:

COE on File (must be for endowed funds): Advancement Designation (s): _____

Approved by: _____ Date: _____

CEO, Controller or Authorized Officer of the
Radford University Foundation, Inc.

Form Updated 5/2018