



To: Executive Director, UNT Foundation

218 Gateway Center Building; FAX: 369-7111

From: \_\_\_\_\_  
(My Name) (My Phone #) (My email)

Date: \_\_\_\_\_

Re: Request To Set Up A New Foundation Account

Please set up a new Foundation account as follows: **(Check one box below)**

**Endowment** (use minimums below; income & reserves & net current yield for this account are used to fund its distributions; no invasion of principal is allowed; management fees charged)

**Quasi-Endowment** (use minimums; income & reserves & net current yield for account are used to fund its distributions; principal may be invaded for the distribution amount; management fees charged)

**NOTE:** Funds for the above are not invested until a MOU for this account has been signed by all parties

**Operating** Account (accounts with month end balances of less than \$50,000 will be charged management fees, accounts with a month end balance of at least \$100,000 will earn interest)

**NOTE:** Funds for the above are placed in cash accounts when received

Name for Account: \_\_\_\_\_  
(Subject to approval by Foundation)

Account Holder: \_\_\_\_\_ Campus Address: \_\_\_\_\_  
(VP, Dean, or Dept. Chair)

**(Check one box below)**

Unrestricted for _____	Restricted for _____
Scholarship \$10,000	Lecturship \$150,000
Presidential Scholarship \$25,000	Professorship \$350,000
Graduate Fellowship \$75,000	Chair \$1,000,000

Known Gifts: \_\_\_\_\_

Donor(s): \_\_\_\_\_

This fund will be created by Deferred Gifts (Please describe in Other Comments below)

MOU (Endowments only) will be Produced by: Me or by \_\_\_\_\_

Other Comments: \_\_\_\_\_

You will be notified by email once a new account has been established