



To: Administrative Assistant, UNT Foundation
149 Gateway Center Building; FAX: 369-7111; email: endowunt@unt.edu

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; distributions will be made in a prudent manner following the Foundation's distribution policy; management fees are charged)

Quasi-Endowment (use minimums below; distributions will be made in a prudent manner following the Foundation's distribution policy; under special conditions, principal may be invaded for additional distribution amounts; management fees are charged)

NOTE: Funds for the above are not invested until a MOU for this account has been signed by the donor(s)

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 or Dean)

(Check one box below)

Unrestricted for _____		Lecturship	\$250,000
Restricted for _____		Professorship	\$500,000
Scholarship	\$25,000	Chair	\$1,500,000
Graduate Fellowship	\$100,000		

Known Gifts: _____

Donor(s): _____

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

Other Comments: _____

You, and the account holder will be notified by email once a new account has been established