



**To:** Administrative Assistant, UNT Foundation  
 149 Gateway Center Building; FAX: 369-7111; 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; income & reserves & net current yield for this account are used to fund prudent distributions; management fees charged.)

**Quasi-Endowment** (use minimums; income & reserves & net current yield for account are used to fund its distributions; under special conditions 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 or Dean)

**(Check one box below)**

- |  |  |
|--|--|
| <input type="checkbox"/> Unrestricted for _____        | <input type="checkbox"/> Restricted for _____    |
| <input type="checkbox"/> Scholarship \$25,000          | <input type="checkbox"/> Professorship \$500,000 |
| <input type="checkbox"/> Graduate Fellowship \$100,000 | <input type="checkbox"/> Chair \$1,500,000       |
| <input type="checkbox"/> Lectureship \$250,000         |  |

**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