

Add/Change Form for Organizations

Send To: Advancement Services
Degheri Alumni Center 312
Extension 4639

Add Change Advance ID# _____

A. Organization

Record Type: Corporation Foundation Family Foundation Contact

Request No Mail No Mail Solicitations No Phone Solicitations Do Not Invite

Note: In order for the business address to appear on the Advance Entity Profile screen, a full mailing address must be provided.

Company/Organization Name: _____

Other names the organization might be known as: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

B. Contact Information

To add an organization, this section must be completed.

Person is already in Advance; Advance ID: _____

Name: _____ Title: _____

Business contact information is the same as in *Section A* above

Business Address <input type="checkbox"/> Preferred	Home Address (if known) <input type="checkbox"/> Preferred
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Street Address:	Street Address:
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City: _____ State: _____ Zip: _____	City: _____ State: _____ Zip: _____
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Phone: _____	Phone: _____
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Cell: _____	Cell: _____
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Email: _____	Email: _____
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Is this a new contact for the organization? Yes No Replacing? _____ Advance ID: _____

C. Covering Account

Covering accounts are limited to business owners, partners, or family members/owners of a family foundation and must be requested and are subject to review. Covering accounts allow **soft** credit to be automatically applied to an individual's Advance record when his/her organization gives a gift. Please call Alicia at ext. 2773 or Jeff at ext. 2778 to request a covering account or if you have questions.

D. Comments

E. Completed By

Print Name: _____ Dept.: _____ Date Submitted: _____

Signature: _____ Ext.: _____ Date Rec'd in AS: _____