



Petition for Funding Form for Underwater Endowment

Endowment Information: (Fields marked by * are required fields)

Oracle Project

Oracle Source (e.g., E/P6099)

Endowment Name

Purpose/Donor Criteria/Other Restrictions

Provide an explanation of the need for funding (Attach additional information and/or documentation if necessary)

Project Manager

Ext.

Date

Requested By

Ext.

Date

*** Basic Financial Information - We encourage departments to attach additional information and analyses**

*** Crucial Endowment Expenditures**

List the crucial endowment expenditures you anticipate for FY17/18. Please attach details if available.

Expense Type/Description

Amount

Total Expenses

Other Resources Identified

List all funding sources you have identified or secured to supplement the crucial expenses. Examples: restricted gift funds, available operating funds, new gifts etc.

Project	Source	Task	Amount
Project	Source	Task	Amount
Project	Source	Task	Amount
Project	Source	Task	Amount
Project	Source	Task	Amount
Project	Source	Task	Amount

Total Revenue

Petition Amount / Net Operating Activity

Finance Office Use Only

Endowment Status

Spending Allowance

Other Sources of Revenue

Cumulative Principle	Current Year Base	Project	Source	Amount
Cumulative Realized Earnings	Prior Year Carry Fwd	Project	Source	Amount
Cumulative Unrealized Earnings		Project	Source	Amount
FMV	Available Allowance	Project	Source	Amount



SIGNATURE ROUTING FORM FOR FUNDING PETITION

Please see endowment petition guidelines for additional information and related timeline

Deadlines	Management	Review/Approval Signature
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March 15	Dean / Department Head	
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*Dean Signature _____	Date _____
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*Department Chair Signature _____	Date _____
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* Signature required if applicable

Please forward completed package to Tax & Compliance at HC 335 by **March 22**

March 31	Compliance Office Review
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COMPLIANCE OFFICE USE ONLY

Date Received <input type="text"/>	Package forwarded to VP of Finance & CFO with recommendation <input type="text"/>
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April 14	Vice President of Finance and CFO
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Final Approval	Approve	Deny
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Maximum Amount From Endowment Principal

Amount To Be Funded From _____

Amount To Be Funded From _____

Amount To Be Funded From _____

Note:

Vice President of Finance and CFO _____ Date _____