

# Gift Processing Form

Send to: Annual Giving  
Degheri Alumni Center Rm.228  
annualgiving@sandiego.edu

All information on this form must be completed before we are able to process this gift.

**A. Donor** Account Advance ID: \_\_\_\_\_ Account Name: \_\_\_\_\_

Account Type:  Household  Corporation  Foundation/Organization  Estate/Trust  Donor Advised Fund (DAF)

**Note:** If the Account doesn't exist in AQ, please complete an Add/Change Form for [Individuals](#) or [Organizations](#) and attach it to this form.

<b>B. Gift Type</b>	<input type="checkbox"/> Pledge payment on existing pledge	<input type="checkbox"/> Cash	<input type="checkbox"/> Credit Card
	<input type="checkbox"/> Pledge agreement (Include pledge agreement or EOF)	<input type="checkbox"/> Check/Money Order # _____	Credit card numbers must be handwritten. Do not retain a copy of this form with credit card information.
If <b>yes</b> , indicate how often:	<input type="checkbox"/> Send pledge reminder? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> ACH/Wire Transfer	# _____
	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Annual <input type="checkbox"/> Annual	<input type="checkbox"/> Stock	CVW/CVC: _____ Exp. Date: _____
Initial pledge payment date: ____ / ____ / ____		<input type="checkbox"/> GiveCampus- online gift	

**C. Gift** Is this gift linked to an Opportunity?  Is this an anonymous gift?  IRA Gift?

Is this donor a stewardee?  Is there a return of funds clause?  Are there deliverables?

	<u>Designations</u>	<u>Distribution</u>
Appeal Code: _____	Acct. # _____	\$ _____
<b>Gross Amount:</b> \$ _____	Acct. # _____	\$ _____
Minus Quid Pro Quo Amount: \$ _____	Acct. # _____	\$ _____
<b>Net Amount:</b> \$ _____	Acct. # _____	\$ _____

**Quid Pro Quo Description/Tribute/Stock Info/Pledge Payment Schedule/Earmarks/Misc. Comments:**

**D. Soft Credit** Soft Credit is limited to family members/ owners of a family foundation or DAFs, or owners and partners of a company.

Account ID: \_\_\_\_\_ Account Name: \_\_\_\_\_

Account ID: \_\_\_\_\_ Account Name: \_\_\_\_\_

Account ID: \_\_\_\_\_ Account Name: \_\_\_\_\_

Account ID: \_\_\_\_\_ Account Name: \_\_\_\_\_

**E. Solicitation Credit** Solicitation credit is for recognizing individuals who help facilitate donations from the company or foundation they work for. If the gift is \$1,500 or more, the individual is eligible for Honorary President Club's

Contact ID: \_\_\_\_\_ Contact Name: \_\_\_\_\_

Contact ID: \_\_\_\_\_ Contact Name: \_\_\_\_\_

Contact ID: \_\_\_\_\_ Contact Name: \_\_\_\_\_

Contact ID: \_\_\_\_\_ Contact Name: \_\_\_\_\_

**F. Gift Officer Credit** Gift Officer Credit is to credit development officers who facilitate a gift or pledge.

DOD Name: \_\_\_\_\_ DOD Name: \_\_\_\_\_

DOD Name: \_\_\_\_\_ DOD Name: \_\_\_\_\_

**G. Completed By** Name: \_\_\_\_\_ Dept: \_\_\_\_\_ Date: \_\_\_\_\_

For gift-related questions, please contact [advancegift@sandiego.edu](mailto:advancegift@sandiego.edu)