

# Gift Processing Form

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

**A. Donor** Advance ID: \_\_\_\_\_ Name: \_\_\_\_\_  Individual  Corporation  Foundation

**Note:** If the donor is a **new corporation** or **foundation**, an [Add/Change form](#) must be attached to this form. If the donor is a **new individual**, please complete the following section.

**New Donor Information (Individuals only)**

Record Type:  Friend  Parent  Other \_\_\_\_\_ Prefix:  Mr.  Mrs.  Ms.  Dr.  Other \_\_\_\_\_

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

Address: \_\_\_\_\_ Company: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_ Title: \_\_\_\_\_

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

**C. Gift** Is this an anonymous gift?  Yes  No Is there a **return of funds clause**?  Yes  No Are there deliverables?  Yes  No

Appeal Code \_\_\_\_\_

**Gross Amount:** \$ \_\_\_\_\_

**Minus Premium Amount:** \$ \_\_\_\_\_

**NET AMOUNT:** \$ \_\_\_\_\_

	<u>Allocation</u>	<u>Distribution</u>
Acct. # _____	\$ _____	_____
Acct. # _____	\$ _____	_____
Acct. # _____	\$ _____	_____

**Premium Description/Comments:**

**D. Soft Credit\*** Adv. ID: \_\_\_\_\_ Donor Name: \_\_\_\_\_

Adv. ID: \_\_\_\_\_ Donor Name: \_\_\_\_\_

**E. Associated Credit\*\*** Adv. ID: \_\_\_\_\_ Donor Name: \_\_\_\_\_

Adv. ID: \_\_\_\_\_ Donor Name: \_\_\_\_\_

**F. Gift Officer Credit\*\*\*** DOD Name: \_\_\_\_\_ DOD Name: \_\_\_\_\_

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

**G. Acknowledgment Information**

Use existing template?  Yes  No

President Harris wishes to acknowledge all gifts \$1,500 and above.  No acknowledgment needed per: \_\_\_\_\_

If acknowledging someone other than the primary donor, please provide his/her information: Name: \_\_\_\_\_ Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

**H. Completed By** Name: \_\_\_\_\_ Dept: \_\_\_\_\_ Ext: \_\_\_\_\_ Date: \_\_\_\_\_

\*Soft credit is limited to family members/owners of a family foundation or owners and partners of a company.

\*\*Associated 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's Club membership.

\*\*\*Gift Officer Credit is to credit development officers who facilitate a gift or pledge of \$10,000 or more.