

INSTRUCTIONS FOR COMPLETING THE GIFT TRANSMITTAL FORM
- INDIVIDUALS -

Complete and send this form with all gifts to Gift Processing (GP) Box 359505 within five working days of receiving a gift. Gifts received without this form or without the equivalent information from another document will not be accepted. Please reconcile and balance gift transactions with Transmittal Form.

Type this form online and keep a copy for your records. Use this form with contributions meeting the following working definition of a gift: irrevocable awards, either unrestricted or restricted to general area of use, that contribute to the general benefit of the University or a component unit. The University may not be obligated to return unexpended funds. The University must select recipients of scholarships and fellowships awarded from gift funds. For further information please contact GP (206-685-1980). Additional guidance may be found in Gift Policy Statement 1 (GPS-1), in Sections D32.1 and D36.0 of the Operations Manual. Will be available on the web at: <http://www.washington.edu/admin/adminpro/OM.html>

Copies of relevant solicitation materials, proposals, and/or donation letters are necessary to substantiate deductibility and must accompany this form. GP will send a receipt to all donors of cash gifts confirming the tax-deductibility of their contributions. The University of Washington does not send receipts for gifts of real property, or deferred gifts. Real property and deferred gifts must be coordinated with the Office of Gift Planning, 206-685-1001, and will be received by that unit.

Donor Name and Address Information

Please provide the donor name, (Who owns the money?), with their address, and telephone number. In the case of corporate or foundation gifts, list the name and title of a contact person within the organization. Acknowledgments will be sent to this contact person, unless otherwise noted. If any person should be given soft credit for this gift, please name them in the space provided for that purpose.

Entity Type

Select one of the following for individuals:

Alumnus, alumna	Faculty/Staff
Friend	Student
Parent	

Gift Information

Use separate forms for each donor. Gifts from many individuals to the same fund, where all the gifts are under \$1,000, may be transmitted with a single form accompanied by the Gift Transmittal Supplement, listing donor names, addresses, gift amounts, and premium amounts, if any. Gifts of \$1,000 and more must be transmitted on separate forms.

Bequests and planned gifts should be forwarded to the Gift Planning Office, Box 351210 — do not submit with this form.

Transaction Type

Select one of the following:

Gift	Assigned Income
Pledge Payment	

Payment Type

Select one of the following:

Check	Electronic funds transfer
Foreign currency	In-kind gift
Company product	Promissory note
Securities	Credit card
Cash/Currency	

Gift Designation Information

If the gift is to an existing fund, indicate the amount, the allocation code, and the corresponding budget number. The allocation code is the six-letter abbreviation for the fund allocation, which may be

identified using the allocation look-up in the Advance system. Designation may be made to more than one area.

Anonymity

Please indicate one of the following if the gift is to be anonymous:

1. *Publications Exclusion* - Exclude name from all donor listing publications. Select this option for individuals who desire to have their name omitted from all publications listing donor participation. This option will replace the donor name with "Anonymous" for all gifts listed under a donor's giving history.
2. *"Anonymous" Profile* - Donor's gift is entered into Advance under an "Anonymous" entity. Select this option if the donor wishes to remain completely anonymous for a specific gift. Any gift reports will simply identify the donor name as "Anonymous". This level prohibits the system from providing automatic credit for giving clubs, generating pledge reminders, crediting the donor's giving summary, or sending tax receipts. *(Receipts for these gifts can be generated manually upon request.)*

Matching Gift

If the gift is to be matched, attach the company's application form. The form will be signed by the matching gift coordinator in GP and forwarded to the company. If you do not have the form, send the other gift paperwork now, and forward the company's application when available. It is the responsibility of the receiving unit to obtain the matching gift application.

Restrictions

If the gift is restricted for a specific purpose, give a brief description in the space provided. Attach all supporting documentation.

In-Kind Gift

For in-kind gifts, provide a description in the space provided of all items and note the valuation. Values reported must be substantiated by attached documentation. Recent bills of sale or independent expert appraisals are acceptable. Where substantiating documents are unavailable, indicate that the value is unassigned. Appraisals made by university personnel are unacceptable because the university is party to the transaction. For gifts of equipment donated by the manufacturer, documentation from the corporation's financial office may be used. In-kind gifts should be acknowledged by the receiving department with a description of the gift, but should not include a confirmation of value on the acknowledgment itself.

In Honor or Memory

If the gift is in honor or memory of another person, please check the correct box and name that person in the space provided. These gifts require special acknowledgment, which is the responsibility of the receiving unit and/or area development office.

Form Prepared and Submitted for Acceptance By

The name of the form preparer, their department, Box Number, and phone number are **required** by GP. Your Department or Development Office may require additional signatures as follows: Required for gifts under \$1,000, signature of the Department Chair, Director or Fund Administrator; for gifts of \$1,000 or more, the signature of the area Development Director, Dean, Vice President, or a representative.