

OSU FOUNDATION
REQUEST FOR ADDITION TO ENDOWMENT

Project Name: _____

Requested by: _____

Project #: _____

Telephone #: _____

Email: _____

Select one of the following:

I am requesting to reinvest excess cash into the endowment account to increase spending policy for the fund.

I am requesting to transfer funds from an unrestricted non-endowed account to an endowment account in order to increase spending policy.

| | Project # | Project Description | Amount |
|-------------------|-----------|---------------------|--------|
| Transferring From | | | |
| Transferring To | | | |

I am requesting to transfer funds from an unrestricted account to an endowment account in order to fully fund the endowment and generate spending policy.

| | Project # | Project Description | Amount |
|-------------------|-----------|---------------------|--------|
| Transferring From | | | |
| Transferring To | | | |

I wish to reinvest current year spending policy distributions plus any future spending policy distributions into the endowment until further notice.

I wish to invest unspent cash gifts (to fund an annual scholarship) into the endowment.

Additional Comments:

Originating Signature

Date

Administrative Signature

Date

***Completed forms should be submitted to compliance@osugiving.com.**