

University of New Mexico Foundation, Inc

Gift Processing Section, 700 Lomas NE, Suite 203 PHONE 277-9600
 FAX 277-1695

Gift/Pledge Transmittal Form

Reported Gifts

Last Revised 07/01/02

This form must accompany all charitable contributions to the University of New Mexico or the UNM Foundation, Inc. Please make a copy for your records. Please refer to the Instructions Sheet below for more information about how to complete this form.

Donor Name and Address Information

Donor Name	Donor Category	UNM ID Number
Spouse Name	Organization Contact Name	
Home Address and Phone Number	Business Address and Phone Number	

Additional Donor-related Information

Gift/Pledge Information

Transaction Type	Payment Type	Anonymous <input type="checkbox"/> Yes <input type="checkbox"/> No	Total amount or Value (US\$)
Source Code or "reported"	Campaign Code	Will This Gift Be Matched? If Yes, By Whom?	

Gift Pledge Designation Information

Gift Amount	Non Gift Amount	Fund Code	Date Received	Gift Purpose Code	<input type="checkbox"/> Yes, Acknowledgment of gift from the Foundation
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Is the use of this gift or pledge restricted by the donor in any way? Yes No If yes, please describe. For in-kind gifts, please describe the asset received, its value, and the source of the valuation. Refer to "[Gifts of Tangible Personal Property](#)" Policy 7110, UBP for further information. (If the value is \$5,000 or more, independent verification of value must be attached)

(Note: For in-kind gifts valued at \$1,00.00 or more, a copy of the form must be sent to Plant Fund Accounting)

Is this gift in honor or memory of anyone? Yes No If yes, please provide the name and UNM ID if available. In Honor of <input type="checkbox"/> In Memory of <input type="checkbox"/>	Were any goods or services provided to the donor in exchange for this gift? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide a description and dollar value.
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If this gift is in honor or memory of someone, please provide next-of-kin contact information.	Should soft credit be awarded with this gift? Yes No If yes, name the entity and provide the UNM ID number if available.
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Form Prepared and Submitted for Acceptance by (signatures required)

Department	School/College/Program	Building	Phone
Form Prepared By	Date	Comment	
Name and Signature of Development Officer	Date	Name and Signature of Department Head	Date
_____ Signature		_____ Signature	

INSTRUCTIONS FOR COMPLETING THE GIFT/PLEDGE TRANSMITTAL FORM

Use this form to report and transmit all gifts, pledges, and pledge payments received by any University department. Please complete and send or fax to the UNM Foundation, Inc. Gift Processing Section within five working days of receiving a gift, pledge, or pledge payment. This form is to be used to transmit either actual gifts or pledge information to the UNM Foundation; or to report to the UNM Foundation gifts or private grants received and processed by a UNM department (please check the appropriate box at the top of the form).

Complete this form for all gifts received. Gifts include true grants received from private sources. Do not report any grants or contracts from any local, state, or federal agency or organization. Cash or check gifts or pledge payments received without this form will be deposited, but will not be processed nor allowed to be spent until the necessary documentation is received.

Copies of all pertinent documents to include donation letters must accompany this form. The Gift Processing Section will send an official University receipt to all donors of cash, check or credit card gifts confirming the tax-deductibility of their contribution. Receipts will not be sent for gifts of real property, gifts-in-kind, or deferred gifts. In-kind gifts should be acknowledged by the receiving department, but should not include a confirmation of value on the acknowledgment itself. Real property and deferred gifts must be coordinated with the Office of Major/Planned Giving (277-6543), Development Office, and will be received by that unit. Real property gifts must be received by the UNM Foundation, not a University department or program.

Donor Name and Address Information

Please provide the complete name, address, and telephone number of the donor, and indicate how the receipt and acknowledgment letter should be formatted. In the case of an organizational gift, list the name and title of a contact person within the organization. Acknowledgments and receipts will be sent to this contact person, unless otherwise noted.

For donor category, select one of the following for individuals:

- Alumnus, alumna Faculty Friend
 Staff Estate/Trust

For organizations, select one of the following:

- Business/corporation • Charitable trust
- Corporate foundation • Foundation
- Other organization

Whenever possible, include the UNM identification number from the Alumni/Development Information System (ADIS).

Gift/Pledge Information

Use separate forms for each donor. Gifts from many individuals to the same fund, where all the gifts or pledge payments are under \$1,000, may be transmitted with a single form. In this case, attach a typed listing of donor names, addresses, gift amounts, and gift dates so that accurate receipts may be produced. Gifts of \$1,000 and more must be transmitted on separate forms.

If the gift is matched, attach the company's matching gift form. The form must be signed by an approved staff member of the Gift Processing Section. If the form was not provided by the donor, the Gift Processing Section will contact the donor and request the appropriate form.

For transaction type, select one of the following:

- Gift • Pledge • Pledge Payment

For payment type, select one of the following:

- Check • Cash/currency • Securities
- Company product • In-kind gift • Credit card

Please indicate if the donor requests the gift to be kept anonymous. In this case, the donor will receive a gift acknowledgment and receipt, but future references to the gift will indicate an anonymous donor.

Indicate the source code associated with the particular solicitation for this transaction. If not provided, the appropriate departmental miscellaneous source code will be used.

If the gift, pledge, or pledge payment is part of a specific campaign, please provide the code for that campaign.

Gift/Pledge Designation Information

Indicate the gift amount and non-gift amount (that portion of the gift for which the donor receives some returned benefit and is not normally tax deductible).

If the gift, pledge, or pledge payment is to an existing fund, indicate the amount, fund code, date received, and purpose of the gift for each fund specified by the donor. The fund code may be obtained from the Gift Processing Section.

For purpose code, select one of the following:

- ad – Academic division
- at – Athletics
- fc – Faculty/staff compensation
- li – Library
- ln – Loan funds
- ot – Other restrictions
- pb – Property, building & equipment
- sc – Student financial aid
- ps – Public service and extension
- re – Research
- ur – Unrestricted

If the donor desires to restrict the gift in any way, give a brief description of the restriction. Attach all supporting documentation.

For new pledges, attach Form *UNMFDN101 New Donor Pledge Form* signed by the donor or verified by the department head. For pledge payments, provide a brief description of the pledge to insure the payment goes toward the correct pledge.

For in-kind gifts, note the actual or estimated valuation. Values reported must be substantiated by attached documentation. Recent bills of sale or independent expert appraisals are acceptable. Where acceptable documents substantiating the value are unavailable, please indicate the value is unknown (these gifts will be recorded at \$1.00). For gifts of equipment donated by the manufacturer, documentation from the corporate financial office must be used. Appraisals made by University personnel are unacceptable because the University is a party to the transaction (**Note: in-kind gifts valued at \$1,000.00 or more, a copy of this form must be sent to Plant Fund Accounting**).

If the gift is in honor or memory of another person, please name that person in the space provided for that purpose. These gifts require special acknowledgment, which is the responsibility of the University Memorial staff officer in the Development Office.

If any goods or services were provided in exchange for this gift, list them and their fair market value in the space provided.

If any entities should be given soft credit for this gift, please name them in the space provided.

Form Prepared and Submitted for Acceptance By

Please provide the signature, typed name, department, and phone number of the person who prepared this form. For gifts under \$1,000, the signature of the department head is required. For gifts larger than \$1,000, the signature of the appropriate dean, director, vice president, or departmental development officer is required. **Your gift(s) will not be processed without the required signatures.**