

PLEDGE ENTRY CHECKLIST

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| DONOR INFORMATION | | | | | | | | | | | | | | | | | | | | | | | |
| Donor Name | | | |  | | | | | | | | | Banner ID | | | | | |  | | | | **Create** |
| Spouse/Partner Name | | | |  | | | | | | | | | Banner ID | | | | | |  | | | | **Create** |
| Donor Address | | | |  | | | | | | | | | | | | | | | | | | | |
|  | | | |  | | | | | | | | | | | | Phone No | | |  | | | Business Cell | |
| Donor Email and Website | | | |  | | | | | | | Business Web | | | | |  | | | | | | Business Web | |
| **In Memory of** | | | | Name | | | | |  | | | | | | | Banner ID | | |  | | | | |
| **In Honor of** | | | | Name | | | | |  | | | | | | | Banner ID | | |  | | | | |
| **Extend Soft Credit to** | | | | Name | | | | |  | | | | | | | Banner ID | | |  | | | | |
| **ANONYMOUS: WILL NOT receive pledge reminders, acknowledgement letters, or be acknowledged on lists associated with the gift**  **CONFIDENTIAL: WILL receive pledge reminders, acknowledgement letters, and will be acknowledged on lists associated with the gift** | | | | | | | | | | | | | | | | | | | | | | | |
| PLEDGE INFORMATION | | | | | | | | | | | | | | | | | | | | | | | |
| Total Pledge Amount | | | | | $ | | | | | | | Pledge Date | | | |  | | | | | | | |
| Designation Information | | | | | | | | | | | | | | | | | | | | | | | |
| $ | | Designation # | | | | |  | | | Designation Name | | | | |  | | | | | | | | |
| $ | | Designation # | | | | |  | | | Designation Name | | | | |  | | | | | | | | |
| Does this COMMITMENT require a NEW designation be created? | | | | | | | | | | | | | | | | | | | | | | | |
| **ENDOWMENT—***Requirement:*  Memorandum of Understanding  **NON ENDOWED**—*Requirement*: Gift Intention form or Spendable Fund Form  **NAMING AGREEMENT**—*Requirement:*  Naming Agreement | | | | | | | | | | | | | | | | | | | | | | | |
| Is the donor employed by a mATCHING GIFT Company? | | | | | | | | | | | | | | | | | | | | | | | |
| Company Name | | |  | | | | | | | | | | | Banner ID | | | |  | | | | | |
| WILL THIS COMMITMENT BE FULFILLED BY ADDITIONAL INDIVIDUALS OR ORGANIZATIONS? | | | | | | | | | | | | | | | | | | | | | | | |
| *Pledges CANNOT be fulfilled by donations received from a Donor Advised Fund* | | | | | | | | | | | | | | | | | | | | | | | |
| Name |  | | | | | | | | | | | | | Banner ID | | | |  | | | | | |
| Name |  | | | | | | | | | | | | | Banner ID | | | |  | | | | | |
| PLEDGE INSTALLMENT INFORMATION | | | | | | | | | | | | | | | | | | | | | | | |
| Pledge Duration | | | | | | years       months | | | | | | | First Payment Due Date | | | | | | |  | | | |
| Installment Frequency | | | | | | ANNUAL  SEMI-ANNUAL  QUARTERLY  NO REMINDER  OTHER | | | | | | | | | | | | | | | | | |
| ACKNOWLEDGEMENT AND SPECIAL INSTRUCTIONS - Use information below for acknowledgement purposes | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | Phone | | | | | | |  | | | |
| Advancement Officer | | | | Name | | | |  | | | | | Banner ID | | | | | | |  | | | |
| Submitted By | | | | Name | | | |  | | | | | Phone | | | |  | | | Submit Date |  | | |

Submit completed form along with all supporting documents to**: KSU Foundation**

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