











**Fund Contacts:**

	<i>Position</i>		
Signature Authority:	UAF Financial Aid Scholarship Coordinator		
Delegated Signature Authority:	UAF Associate Director of Financial Aid		
Organizational:	UAF Director of Financial Aid		
Organizational:	UAF President of the Staff Council	<i>Current Individual</i>	<i>RE ID#</i>
Original DO:	-----		
Original Donor:	-----	UA No External Fund Contact)	147448
Significant Interest:	-----	UAF Staff Council	64580

*All fund contacts, except signature authority, can be changed without a formal revision.*

**Standard Terms:**

- A. All gifts and endowed balances are subject to fees as determined from time to time by the Board of Trustees.
- B. This fund will be managed in accordance with the investment and fund administration policies approved (and as may subsequently be amended from time to time) by the Foundation Board of Trustees.
- C. A recipient of a scholarship or award from this fund will forfeit the scholarship or award if he or she:
  - 1. Does not enroll in the semester in which the award is in effect; and
  - 2. Does not maintain Satisfactory Academic Progress (SAP), as defined by UA, towards his/her education goals, to be tracked by the campus financial aid office.
- D. No Foundation scholarship may allow the student's aid package to exceed their calculated Cost of Attendance (COA). The campus financial office will track COA.
- E. A recipient shall not be notified of his or her award until the expenditure has been approved by the Foundation.

*\*This criterion was chosen by the fund's Original Donor and may not be altered outside of the Foundation's formal revision process and/or without the Original Donor's written approval.*

**Approvals:**

Signature Authority, UAF Associate Director of Financial Aid: Julie Parshall N/A - Protected Class Policy Revision

Fund & Gift Services Manager: Taylor Dine Taylor Dine Date: 11/23/2016

Senior Fund & Gift Svcs Mgr: Amber Gichard Amber R. Gichard Date: 11/23/2016

**For Foundation Accounting Use Only:**

Project Number(s): <u>80586</u>	Unrest	Temp Rest	Perm Rest
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If this project is an endowment or Quasi endowment, then determine the accounting classification for the principal, spending, and unexpended earnings. Set up three project numbers 6XXXX, 7XXXX, and 8XXXX. Note, both the 6XXXX and 7XXXX project numbers will be set up with the same accounting classification.

**Fund Balance Account:**

Restricted Account Number: _____
Endowment Account Numbers: _____

- |   |  |
|---|--|
| <input type="checkbox"/> Update Project List in Excel | <input type="checkbox"/> Create project in Raiser's Edge |
| <input type="checkbox"/> Configure Project            | <input type="checkbox"/> Account                         |

Set-Up By: <u>[Signature]</u>	Date: <u>1/18/17</u>
Accounting Approval: <u>[Signature]</u>	Date: <u>01/30/17</u>