Policy

The **Gift/Pledge Transmittal Form** must be completed and submitted to facilitate the processing of all charitable support received throughout the schools, colleges and departments of Tulane University*. There should be a single/unique **Gift/Pledge Transmittal Form** for each gift or pledge.

All fields on the form must be completed in order for the Gift Accounting Office in Alumni Development Information Services (ADIS) to correctly process the gift. Attached to the transmittal form should be appropriate donor documentation as audit back-up in addition to any checks or credit card payment details. Documentation may be in the form of a letter from the donor, a fully executed gift/pledge agreement, or potentially an email exchange clearly including participation from the donor in which all of the necessary details are outlined. Please also attach the original postmarked outside envelope in which any gifts submitted through USPS were sent to Tulane.

*The only exception to submitting a transmittal form is when a solicitation reply device that conveys all of the same information outlined on a transmittal is attached to the check and related documents.

[Note: If this is a grant-related item (account/project number 5#####), a **Research Administration Deposit Form** should be prepared instead of a **Gift/Pledge Transmittal Form**.]

Gift/Pledge Transmittal Form

Completed forms, along with all supporting documentation, should be forwarded to the Gift Accounting Office, 1555 Poydras Street, Suite 1000, via campus mail. Please contact Gift Accounting Office at tugift@tulane.edu or 314-GIFT [5438] if you need to arrange expedited gift documentation delivery.

Instructions for Completing a Gift/Pledge Transmittal Form

Complete the **Gift/Pledge Transmittal Deposit Form** by entering data into the following fields:

1. **Complete by:** The name of the primary contact person responsible for preparing the Gift Transmittal Form.
2. **Phone/Extension:** The phone number (include extension, if applicable) of the primary contact person reflected in #1 above.
3. **Date Completed:** The date that the transmittal is completed.
4. **Dept./Dev./School:** The name of the department, division or school (or program) where the primary contact person is located.
5. **Constituent (name):** For gifts by check, this is typically the name that appears on the check; contact the Gift Accounting Office if you are uncertain as to the identity of the donor. Indicate the development database record **ID# -** if known – of the donor; if no record exists, please

ensure that complete contact information including address and phone number are provided in back-up documentation in order to establish a new record.

6. **Credit for:** The person or persons who should have recognition credit applied to their constituent record for the contribution. [Example: The Smith Family Foundation makes a gift of $5,000 to Tulane University. John Smith is the president of the Smith Family Foundation and also a graduate of Tulane and can reasonably be issued soft credit for the gift.] Indicate the development database record **ID# -** if known – of the donor; please ensure that complete contact information including address and phone number are provided in back-up documentation in order to establish a new record.

7. **In Honor/Memory of:** The name of the person in whose honor the gift is being made, if applicable. Indicate the development database record **ID# -** if known – of the tributee; if no record exists, please ensure that complete contact information including address and phone number are provided in back-up documentation in order to establish a new record.

8. **Transaction Total:** The total cash (or equivalent) amount of the transaction; in the case of securities or other in kind gifts, this is typically the total mean value of the stocks or bonds or the appraised fair market value of the property on the day Tulane received it.

9. **Quid Pro Quo (value of accepted benefits):** The fair market value of benefits provided to/accepted by the donor in consideration of their gift; contact the Gift Accounting Office if you are uncertain about determining fair market value.

10. **To be anonymous?** Indicate whether or not the donor has any request for the gift to be anonymous; any further details as to recognition concerns should be referenced in the Comments section of the transmittal form.

11. **Proposal/Planned Gift link?** Indicate if this transaction is associated with a major gift proposal or planned gift commitment.

12. **Account/Purpose:** The six-digit General Ledger account number reflecting the intended purpose of the gift into which the funds are to be deposited; include the name of the account.

13. **Campaign:** Specific campaign towards which the transactions should be counted.

14. **Transaction Type:** Indicate whether the transaction is an outright new gift, a pledge payment, a planned gift/bequest or a new pledge; for new pledges, the number of payments, start date, and anticipated schedule of payments must be provided.

15. **Solicitation code:** Indicate the appropriate code associated with the gift solicitation, if applicable; if a new code needs to be established, then contact the Gift Accounting Office.

16. **Tender:** Indicate whether this gift is coming in the form of a check, cash, securities (stocks or bonds), or a credit card (VISA, MasterCard and American Express accepted) or one of the electronic funds conveyance methods; transmittal form can be completed with credit card details where back-up documentation does not reflect this information. [Note: For any requests to accept and credit the value of in kind gifts (other than securities), please contact the Gift Accounting Office prior to submitting transaction details for instructions on appropriate support documentation and forms to use.]

17. **Comment Section:** Should be completed with any particular instructions regarding this gift including special recognition. [For credit card contributions made via phone, utilize the Comments section to note the date and time of the call as well as the anticipated payment schedule (either single payment or multiple payments with a start and end date for recurring charge gifts).]