LSU New Orleans Foundation
Request for New Foundation Account

Date: _____

College or Administrative Office _____

Department Name: _____

Account Administrator _____ **Phone #:** _____

Signature of Administrator: _____

Account Title: _____

Type of Account:
(please select one)

☐ **ENDOWMENT** (Only interest earnings may be spent)

☐ **RESTRICTED** (All deposits may be spent)

Purpose of Account:
(please select one)

☐ Scholarship/Award ☐ Department Development

☐ Building Funds ☐ Research ☐ Educational Studies

Detail Description:

_____

_____

Source of Funding

☐ **Grant** ☐ **Contract** ☐ **Contributions** ☐ **Other ***

* explain in detail description above

Approval _____
Vice President or Dean's Signature

FORM WILL NOT BE PROCESSED WITHOUT SIGNATURE

Return to: Andrew Pitman CFO, ATC Suite 420, Research Park

(For Foundation Accounting Office Use Only)

Restricted Account Number _____

Endowed Account Number _____ **---** _____
(Principal) (Earnings)

_____ _____
Chief Financial Officer Date

Instructions for New Account Form

College or Administrative Office: College or administrative office that over sees department

Department Name: Department that will benefit from funds and be responsible for administration of account

Account Administrator Person who is responsible for administration of account and who must sign off on all check request & transfer of funds request forms
(Could be more than one person; all individuals authorized to access funds must be listed and sign form)

Signature of Administrator: Must have administrator's signature **Extension:** Phone extension of administrator

Account Title: Name must relate to purpose of account and be unique

Type of Account: **(You must select ONE)**

Endowed (Only interest earnings may be spent)

Restricted (All deposits may be spent)

Purpose of Account: Select one of the categories that best describes the accounts purpose

- Department Development - dept. travel, supplies, conferences, etc.
- Educational Studies - seminars, training courses, enhancing educational programs
- Building funds - funds raised for the construction of or repairs to facilities
- Research & Scholarships - self explanatory

Detail Description: Describe what the account will be supporting. Also include the source of the funds to be deposited in the account. Example: Donor Contributions, fund raising event, other earned revenue, private grant, etc.

If it is a grant or a contract please mark one and list the granting agency or organization that is contracting with Dept. in the detail description area above.

The Foundation Office will assign an account number and return a copy of the request form with the account number back to the account administrator.