



REQUEST FOR QUASI-ENDOWMENT INVESTMENT

Requestor:

Business area:

Is this a NEW REQUEST or an addition to an EXISTING QUASI:

Can this request be consolidated with a related quasi-endowment?

Purpose and rationale for requesting the quasi-endowment:

Endowment support classification:

Amount: (if new, minimum is \$100,000)

Account # and name for source of funds:

Source Comments/Explanation

Current Year Income

Existing Cash Balances

Grant Proceeds

Other (Please Explain)

TOTAL

Beneficiary of Distributions

Department:

Account # - New (TBD) or Existing:

Approvals

Date

Director of Managerial Accounting:

Vice Chancellor, Finance and Administration:

Chancellor:

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Attach other supporting documents as appropriate and send to your Business Manager.

Note: Investments in quasi-endowments are subject to market volatility and may decrease in value.