

Quasi-Endowment Request Form

Distribution Rules

Quasi-endowments will be set to distribute spending income upon investment. If the quasi-endowment is set up as a partner to a permanent endowment, the quasi-endowment will take on the distribution rules of the permanent endowment.

If you would like the quasi-endowment to reinvest earned income, please provide an explanation and timeframe for the reinvestment:

Supporting Documentation

Please include a copy of all applicable documents in your request:

1. Current ledger report of impacted chart string (required)
2. Gift agreement and gift receipt IDs (if funded by or partnering with donor gifts)

Approvals

Approvals should be completed in alignment with the resource request process. If the request is approved, please connect with Accounting Services for advisement on next steps.

Responsible Office: Financial Operations

Updated: September 3, 2024