



# NEW ACCOUNT REQUEST FORM

This form is used by USC Advancement Services to establish a new account (project) in CRM. Please complete and remit this form to Amie Schaffer (777-8340) at [rischbia@mailbox.sc.edu](mailto:rischbia@mailbox.sc.edu).

### PREPARER INFORMATION:

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

**\*Please Note:** An *approved Draft Gift Agreement* must accompany this form.

### ACCOUNT (PROJECT) INFORMATION:

Account Name: \_\_\_\_\_

Account Type: \_\_\_\_\_  
(Required)

Account Type 2: \_\_\_\_\_  
(Optional)

College/Unit: \_\_\_\_\_

Department: \_\_\_\_\_

|                           |           |  |
|---------------------------|-----------|--|
| Endowment Classification: | Unendowed | There are no intentions of ever endowing this project  |
|                           | Endowed   | The project will be endowed when the fully executed gift agreement has been received and the funds have reached the required endowment level |

Amount Ready to Deposit into Account: \_\_\_\_\_  
If no money has been received, when do you anticipate the first deposit? \_\_\_\_\_

Will funding for this project be *predominantly* generated by fundraising events?      YES      NO

Donor Name: \_\_\_\_\_

Donor CRM ID: \_\_\_\_\_  
(If the Donor is deceased, please specify who should receive donor letters.)

### FOR FOUNDATION USE ONLY

Project ID Assigned: \_\_\_\_\_

Date: \_\_\_\_\_