



MC 5-32, Pasadena, CA 91125

version 2020.01

Forward to Gift and Records | MC 5-32

Lockbox - Millikan 301

Campus Use – Non AAR

Gift Information Form (**Denotes a required field)

Prepared By**

Ext**

Date**

Donor Name**

New Donor (address in comments)

Check Number**

Account and Funds Distribution Information

New Funding Source Number and PTA requested (via Oracle)

Account/Fund Name**

Funding Source/PTA**

Amount**

Restrictions

Division

Department

Donor Restrictions/Gift Purpose:

Principal Investigator or Person Responsible for Gift

Comments (include any contact updates here, required for new donors)

**Attach gift to gift information form and forward to Gift and Records | MC 5-32
Lockbox in Millikan 301: room across from elevators.**

Please contact Chris Meneses for any questions: cmeneses@caltech.edu

Caltech

MC 5-32, Pasadena, CA 91125

All fields in red and denoted with ** are required. Submission of forms with incomplete information could result in delays in processing of the gift.

Gift Information Form

Prepared By:** Your name.

Extension:** Your extension.

Date:** Today's date.

Donor Name:** Donor's name.

New Donor: Check if new donor. Please include contact information in comments.

Gift Received Date:** Date the gift was received.

Check Number:** Check number.

Accounts and Funds Distribution Information

Check if a new Funding Source/PTA has been requested. The new request should be made via the Oracle PTA setup request. The requested PTA can be entered below. Funds will be put in the holding account temporarily. Once the PTA and Funding Source have been created by Finance, AAR will be notified and the funds will be transferred from the holding account.

Account/Fund Name – Funding Source/PTA** – Amount**:** Indicate the gift's designation by writing the account/fund name, FS/PTA number and amount.

Restrictions

Division/Department: Division and department (if applicable) that the gift is restricted to.

Donor Restrictions/Gift Purpose: Other donor specifications.

P.I./Person Responsible: Name of the person responsible for the gift.

Comments: Other comments/special instructions for the gift. Any contact information updates should be noted here. If new donor, use this space to provide contact information. Include any special handling request.

Submission

Attach gift to gift information form and submit to Gifts and Records.

- Lockbox on Millikan 3rd floor: straight out of the elevator towards the copier, will be on the left hand wall across from the mailboxes.
- Campus mail: MC 5-32

