



GIFT DOCUMENTATION TEMPLATES

The following templates are meant to assist with gathering documentation about a donor's gift intentions as required by University of Washington policy. Two formats are included here:

1. To be sent from a fundraiser or other staff member to a donor to confirm the intention of their donation, and
2. To be shared with a donor for them to send to the University, possibly with their donation; can be sent either by email or mail.

In addition, detailed instructions for completing the templates and general FAQs regarding gift documentation are provided.

Email from a Fundraiser to the Donor for Written Confirmation

Dear <First Name of Donor>,

I'm writing to thank you for your interest in supporting the <UW Foundation/University of Washington>! I am confirming your intention to support <unit name>.

Your gift of \$#### will <support/establish> the <Gift Fund Name> (<fund code>).

We are so grateful for the impact your gift is going to make. Please reply at your convenience affirming that I have correctly summarized your intentions.

Sincerely,
<Fundraiser First Name>

Template for a Letter from a Donor to UW

Dear <First Name of Fundraiser>,

I'm writing to confirm that my gift is intended to support the <unit name> at <UW Foundation/University of Washington>.

My gift of \$#### will <support/establish> the <Gift Fund Name> (<fund code>).

[I/We/<org name>] are pleased to make this gift.

Sincerely,
<Donor Name>

Questions?

Please contact CAS Advancement Services at casadser@uw.edu



INSTRUCTIONS FOR USE

Instructions

1. Identify which version of the form you will be using.

- a. Have you had a gift conversation with the donor, already know their intentions, and does your donor communicate via email? If so, use the "Email from a Fundraiser to the Donor" version to request a reply to confirm their intent.
- b. Does your donor intend to send a check to the University? If so, use the "Template for a Letter from a Donor to UW" version, and ask the donor to include the printed letter with their check.
- c. Has a gift already been received that requires additional documentation? If so, use the "Email from a Fundraiser to the Donor" version to request a written reply to confirm their intent.

2. Complete the gift documentation form with as much information as possible.

- b. Required fields include:
 - a. Donor name
 - b. Choose either UW Foundation or UW. *(See below for information on how to make this determination. This will determine who the donor should make their gift payable to.)*
 - c. Unit name
 - d. Gift amount
 - e. Choose whether this will be supporting an existing fund or [establishing a new one](#).
 - f. Gift fund name
 - g. Fund code (if one has been established)

3. Submit the completed documentation to Gift Services at gifts@uw.edu and copy CAS Advancement Services (casadser@uw.edu).

- c. If using the "Email from a Fundraiser to the Donor" version, send along the donor's confirmation of their intent from their reply email.
- d. If using the "Template for a Letter from a Donor to UW" version, direct the donor's email to Gift Services, or instruct them to mail the printed version to:

Gift Services
University of Washington
Box 359505
Seattle, WA 98195-9505

Questions?

Please contact CAS Advancement Services at casadser@uw.edu



FAQs – Gift Documentation Templates

FAQs

Who are these templates for?

These templates are for University employees receiving gifts from donors.

What do these templates accomplish?

Gift documentation ensures that the donor's gift intentions are clear and in alignment with UW policies. It is used as documentation to confirm that gifts are allocated correctly for audit purposes, and for donor tax considerations.

When do I use one of these forms?

A gift documentation template should be used proactively before a gift is received to ensure Gift Services has the documentation they need to process the gift. It can also be used after a gift is received if the gift doesn't include enough detail about the donor's intent.

A gift documentation template should be used when:

- The donor is giving to an already existing fund, or
- The donor is giving to establish a new gift fund, or
- The donor is sending a check/wire/ACH payment.

How will the completed form get to Gift Services?

If you receive gift documentation from a donor, please share it directly with Gift Services at gifts@uw.edu and copy the CAS Advancement Services (casadser@uw.edu). You can also attach this with the Gift Transmittal Form if you are sending one.

If you know a donor plans to send in a check, the donor can print the completed gift documentation letter to indicate their intentions and send it in with their donation.

UW Foundation vs. UW Determination

From time to time, Gift Services receives questions about the differences between the UW vs. the UW Foundation. It's important to remember that these are separate legal entities. Here is a quick guide of external and internal considerations for bringing a gift through the UW or the UW Foundation.

Purpose

The primary purpose of the UW Foundation is to facilitate private contributions for the benefit of the University of Washington.

Donor Tax Considerations

While gifts to either the UW or the UW Foundation are considered charitable by the IRS and may be eligible for a tax deduction, they are covered by different tax law.

Some donors and funders are required to give to a 501(c)3 for tax purposes. The reasons can vary significantly as to why a donor needs to be receipted by a 501(c)3. Some corporations, for example, will only match gifts made to a

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legal non-profit organization; Foundations may stipulate in their bylaws that they must give to a 501(c)3; and depending on the giving channel or tax instrument, a donor must give to the UW Foundation, not the UW.

Processing Considerations

To receive a receipt by the UW Foundation, we are required to follow the “Pay to Order” of the gift. We use this to determine which EIN to receipt from. It’s important to note that the UW and UW Foundation have separate audits, and the University cannot change the who on the “Pay to Order” is after the fact.

Payment Considerations

The “Pay to Order” for checks is clearly stated: a check to “UW Foundation” is processed as such while gifts to the “University of Washington,” “UW Medicine,” “Husky Football,” etc. all fall within the UW receipt and audit process. However, other payment mechanisms are less clear.

Forms of electronic payment, like wire transfers and credit card transactions, are considered “UW” by default unless the donor clearly articulates “UW Foundation” when they submit their payment. Other forms of payment, like gifts of securities, real estate, and in-kind gifts must be processed through the UW.

Agreement Considerations

Only the UW Foundation President can sign an agreement between a funder and the UW Foundation.

Please reach out to Gift Services (gifts@uw.edu) if you have questions about payment processing before a gift is made!

Questions?

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