



Fund Change Form

This form is used to request a change in the college/unit, department, name, purpose or administration of a fund. For changes of name or purpose to funds that were originally established based on a gift agreement or other form of directive from a donor, you must attach written documentation showing that the donor is in agreement with the requested changes.

Department Contact _____ Phone Number _____

Section I - Fund Information

If changes are being requested to multiple funds, please attach a separate spreadsheet detailing each fund number and fund name and the requested changes.

Fund Number _____

Fund Name _____

Reason for Change(s):

Section II - Requested Fund Changes

College/Unit _____ Department _____

Fund Name (If this is a donor fund, include documentation from donor requesting change in fund name.)

Fund Purpose (Include a full description of the purpose for the fund. Detail any restrictions the donor has placed on the use of donations and the types of disbursements that will be made. Attach donor agreement, if applicable.)

Responsible Party _____ Signature of new RP _____ For Web Report Access Include OMNI ID _____

Fund Administrator _____ The Fund Administrator is NOT an authorized signer unless he/she is listed as one of the authorized signers below.

Responsible Party Designees (Up to two designees) Someone authorized by the Responsible Party to sign on his/her behalf.

Additional Approvers (Up to three additional signers) Someone authorized to approve transactions that do not require the approval of the Responsible Party.

For Web Report Access Include OMNI ID
1. _____
2. _____

For Web Report Access Include OMNI ID
1. _____
2. _____
3. _____

Section III - Fund Approval

Signature of Responsible Party is required and constitutes approval of all information on this form.

Signature of Responsible Party _____ Printed Name of Responsible Party _____ Date _____

Table with 4 columns and 3 rows for office use only, including fields for Approved By, Attribute Change, Updated By, Date, and VSE Sub.