

DONATION PROCESSING FORM

1. Donor Information

Pledged-By Donor Create new record

Name Lookup ID

Street Address City Province Postal Code

If payment is made by a different donor, please indicate below:

Name Lookup ID

Street Address City Province Postal Code

Recognition Credit

Joint Recognition With Spouse

Name Lookup ID

Soft Credit Third Party

Name Lookup ID

2. Pledge Details (Complete if new pledge.)

Pledge Amount Installment Amount Reminder: No

Yes, by: DUA Divisional

Installment Frequency

Single Payment:

Fulfillment Date

Regular Schedule:

Annually

Quarterly

Monthly

Start Date

End Date

Ongoing Payment (no end date)

Irregular/Other Schedule:

3. Payment Details

Payment Amount

Payment Method

CAD USD

Other Currency

OTO New Payment

Planned Gift

1st Payment on New Pledge

Apply to Existing Pledge:

Rev ID

Pledge Amount

Cash Payroll:

Cheque

Credit Card:

Visa

MasterCard

American Express

Personnel Number

Credit Card Number

Name of Cardholder

Other Method

Expiry (MM/YY)

4. Gift Designation

Designation Name Designation Lookup ID

Endowed

Expendable

Enhanced Payout

Create New Fund:

If gift is to be split with multiple designations, please indicate the details under 6. Special Instructions.

5. Marketing Effort Information

Source code Effort Appeal Finder Number

Is this gift linked to an active opportunity?

No

Yes:

Name of the Opportunity

6. Special Instructions

Receipt, special handling, etc.

Submitted by Date Department Phone Number