

# Asset Transmittal Form

**Important:**

- This form should accompany all checks/cash. Checks for deposit into a Foundation account should be made payable to the **Texas A&M Foundation**. For audit purposes, copies of all correspondence relative to the deposit should be attached.
- Please refer to the attached Instruction Sheet for more information about how to complete this form. For more than one donor to the same account, complete and attach the Asset Transmittal Supplement to this form.

### GIFT DESIGNATION INFORMATION (For allocating the gift to one or more areas.)

Amount	Account No	Account Name
	←Total	

### GIFT INFORMATION

Payment Type (required)	Deposit Type (required)	If Deposit Type is Other, please explain:
Will this gift be matched? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, by whom?  Attach Matching Gift Form.	Is this gift in memory or honor of anyone? If yes to either, please provide acknowledgement information: <input type="checkbox"/> In Memory of      Notify:  <input type="checkbox"/> In Honor of      Notify:	

### FORM PREPARER INFORMATION

Name of Form Preparer (required)	Email address	Mail Stop (required)	Phone (required)
College/Department	Department Approval		Date

### DONOR INFORMATION

Check No.	Amount	Individual or Organization Name	Address (if not on check)	Donor Organization Contact

### RESEARCH ACTIVITIES OR COMPLIANCE ISSUES

Do these funds involve research activity or compliance issues?  Yes  No If yes, please certify the following information with signatures below: This gift is accepted with the understanding that the University recipient(s) are aware of the scope of the research to be conducted. These funds are bestowed voluntarily by the donor and are not subject to a contract or with the expectation of any tangible compensation.

Principal Investigator	Date	Director/Dean of Unit	Date
Department Head	Date	The Unit Head should forward a signed copy of the form with attachments to the Office of Vice President for Research Information purposes. <b><u>The original form and attachments should continue through the normal gift acceptance procedures.</u></b>	

Do the activities funded by the gift involve any of the following issues?  Yes  No  
 Please check item(s) that apply:  human subjects,  laboratory animals,  recombinant DNA,  infectious biohazards,  radioactive materials, or  conflict of interest issues. **Appropriate compliance documents must be filed and required reviews completed as necessary. It is the responsibility of the recipient University to provide the Foundation with appropriate clearance prior to the release of funds for expenditure.**

**INSTRUCTIONS FOR COMPLETING THE GIFT  
TRANSMITTAL FORM**

**Complete and send this form with all gifts to Texas A&M Foundation Gift Processing Mail Stop 1234** within five working days of receiving a gift. Gifts received without this form or without the equivalent information from another document will not be accepted. Please reconcile and balance gift transactions with Transmittal Form. **Keep a copy of this form for your records.**

Deposits from corporations/foundations or individuals that are questionable as to their classification regarding unrelated business income will require a written statement from the donor clarifying their gift status.

**Copies of relevant solicitation materials, proposals, and/or donation letters are necessary to substantiate deductibility and must accompany this form.** Gift Processing will send a receipt to all donors of gifts confirming the tax-deductibility of their contributions.

**Gift Designation Information**

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If the gift is to an existing account, indicate the amount, the account number, and account name. Designation may be made to more than one area. The total must match the amount of the check.

**Gift Information**

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Use separate forms for each donor. Gifts from more than one donor to the same account may be transmitted with a single form accompanied by the Gift Transmittal Supplement, listing check numbers, donor names, addresses, contacts, and gift amounts.

**Payment Type**

This is a drop-down box used to designate whether the gift is check, cash, foreign currency or securities.

**Deposit Type**

This is a drop-down box used to designate whether the gift is endowed, non-endowed, a repayment of advance, an expense refund, or other. If other is used, please explain in the space provided.

**Matching Gift**

If the gift is to be matched, attach the company's matching gift form. The form will be signed by the Vice President and Controller of the Texas A&M Foundation and forwarded to the company. If you do not have the form, send the other gift paperwork now, and forward the company's matching gift form when available.

**In Memory or Honor**

If the gift is in honor or memory of another person, please check the correct box and name that person in the space provided. Provide acknowledgement information on whom should be notified and their address.

**Form Preparer Information**

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The name of the form preparer, their email address, their department, mail stop, and phone number are **required** by Gift Processing. The form is then approved by the designated representative in the department.

**Donor Name and Address Information**

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Please provide the check number, amount, donor name and address. In the case of corporate or foundation gifts, list the name, title and address of a contact person within the organization. Acknowledgments will be sent to this contact person, unless otherwise noted.

**Research Activities and Compliance Issues**

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If these funds involve any research activity or compliance issues, please complete this section and provide the appropriate documents.