

PLEDGE TRANSMITTAL FORM

Please return this form to:
 UTSA Development and Alumni Relations
 UTSA Gift Services
 One UTSA Circle
 San Antonio, TX 78249
 Engagement

COMPLETE THIS FORM AS APPROPRIATE FOR GIFTS MADE ON BEHALF OF AN INDIVIDUAL OR BUSINESS

Individual Pledge Business Pledge Do not send credit card information through interoffice mail, fax, or email.

DONOR CONTACT AND SALUTATION INFORMATION

Received Date _____
 Individual or Business Name _____ CID if known _____
 Salutation _____
 Address _____
 City _____ State _____ Zip _____
 Cell Phone _____ Business Phone _____
 Email _____
 Current Employer _____ Same as Business Name

PLEDGE INFORMATION (Per the IRS, a donor cannot donate to a fund they are the administrator of.)

Total Pledge Amount _____
 Fund Name _____ Account _____ Cost Center _____ Amount _____
 Fund Name _____ Account _____ Cost Center _____ Amount _____

INSTALLMENT INFORMATION

Number of Payments _____ Amount per Installment _____ Start Date _____
 Installment Schedule Monthly Annually
 Electronic Fund Transfer (EFT) Yes No 1st 15th

RECURRING INFORMATION

Recurring gifts must be processed with a credit card and will continue indefinitely until the donor requests termination, the credit card expires, or the credit card is compromised.

Select One: Recurring gifts are processed monthly on the 1st or the 15th

Fund Name _____ Account _____ Cost Center _____ Amount _____
 Fund Name _____ Account _____ Cost Center _____ Amount _____

ADDITIONAL REQUIRED INFORMATION

College/Department _____
 Opportunity Yes No Opportunity Name _____
 Appeal Yes No Appeal Name _____
 Soft Credit Yes No Soft Credit Name _____
 Anonymous Gift Yes No
 Action Yes No Action Name _____
 Tribute Yes No Tribute Name _____
 Tribute Type IHO IMO
 Acknowledgee Name _____
 Acknowledgee Address _____ City _____ State _____ Zip _____
 Additional Pledge Information _____

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PAYMENT INFORMATION

Pledge Amount _____ Cash Check Credit Card

Credit Card Type Mastercard Visa Amex Discover

Name on Card (Company Name if Business Card) _____

Name on personal credit card will receive hard credit

Credit Card # _____ Exp. Date _____ Security Code _____

Credit card number will be destroyed after charge is successfully completed

Prepared By _____ Date _____ Phone _____

Signature _____ College/ Department _____

PLEDGE TRANSMITTAL FORM INSTRUCTIONS

1. Complete the Pledge Transmittal Form (PTF) as appropriate for pledges made on behalf of an individual or a business.
 2. Hand deliver Pledge Transmittal Forms or agreements to Gift Services. Do not send through interoffice mail. Do not fax or email credit card information.
 3. Provide the appropriate individual or business name for the donor and the corresponding contact information for the individual or business. Include the donor's preferred salutation.
 4. Provide the designation information including the fund name, account, cost center, and amount for each designation. If the account is unknown, please write the word Gift or Benefit.
 5. If the pledge is connected to an opportunity (proposal) or action, provide the name of the opportunity (proposal) or action and date.
 6. Provide the name of the individual who prepared the PTF as well as his/her college/department. The form must be signed by the preparer. The agreement must be signed by the donor and the appropriate UTSA official.
 7. If the pledge is a tribute, provide the name of the tributee along with the name and address of the acknowledgee. Please indicate if the tribute is in honor (IHO) or in memory of (IMO) the tributee.
 8. Deliver pledge(s), Pledge Transmittal Form or agreement, and any other applicable documents to UTSA Gift Services.
 9. If you have any questions, please contact the UTSA Gift Services Manager at 210-458-6818.
- *If an opportunity (proposal) or action exists on a record other than the donor's record, please provide the name and CID if known.