

Date \_\_\_\_\_

ENDOWED or LOAN FUND PROPOSED FOR REVIEW BY THE GENERAL COUNSEL  
[form to be completed for those funds under review, including those  
whose terms have become difficult to administer]

Name of Fund \_\_\_\_\_ Year Established \_\_\_\_\_

Campus(es) \_\_\_\_\_

Book Value \$ \_\_\_\_\_ as of \_\_\_\_\_

Market Value \$ \_\_\_\_\_ as of \_\_\_\_\_

Accumulated Payout \$ \_\_\_\_\_ as of \_\_\_\_\_

Estimated Annual Payout \$ \_\_\_\_\_ as of \_\_\_\_\_

1. Purpose of fund, including the donor's restrictions:
2. Fund record for the past five years (list fund expenditures):
3. Efforts to utilize the payout under the present restrictions:

For funds whose terms have become difficult to administer:

4. Factors which may have reduced the opportunities to use the payout from this fund:
5. Burden of administering the fund as currently restricted:
6. Proposed revision of the terms:
7. Reasons the proposed alternative would result in better utilization of the fund:

ATTACH COPY OF GIFT INSTRUMENT.

Submitted by: \_\_\_\_\_

Title: \_\_\_\_\_

E-mail \_\_\_\_\_

Telephone: \_\_\_\_\_