



## Endowed Fund Worksheet

Fund Name: \_\_\_\_\_

Donor Name(s): \_\_\_\_\_

Donor City/State: \_\_\_\_\_

Gift amount\*\*: \_\_\_\_\_

Purpose of the fund:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Criteria for awarding:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(Optional) Designated fund contact: \_\_\_\_\_

\*\*If the initial gift amount is less than \$25,000, please note that the \$25,000 principal threshold must be reached within three years after the date of the Agreement. In the event the principal of the Fund does not equal or exceed \$25,000 within three years of the date of the Agreement, the funds may be transferred to the general endowment of the Southern Nazarene University Foundation, to another endowed fund with a similar purpose, or to a restricted fund within the same operational area of the new fund.

If the fund agreement is created as part of an estate planning process, the three-year timeline does not apply, but the \$25,000 minimum must still be met to fully endow the fund.

*Questions? Call our donor services office at (405) 491-6311 or email [advancement@snu.edu](mailto:advancement@snu.edu).*