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***A D V A N C E M E N T I N F O R M A T I O N S E R V I C E S***

**Gift/Pledge Processing Form**

***Submitted by\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (****name****) Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

***Dept\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Phone\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

Complete this form for **ALL** gifts and pledges received *without* an accompanying gift card.  Please be intentional in providing the donor’s name, contact information, the associated credit, gift allocation, and payment schedules. Gifts received through USPS may be delivered in original envelope to AGR. If submitting multiple gifts, send donor gift card OR complete processing form for each and send together with sum total of checks. Attach all original documentation. Forward form and pledge/check to: Advancement Gifts & Records, **MSC 3603**, 1031 Harrison St., Harrisonburg, VA 22807.

 **Gift Pledge Matching Gift Planned Gift**

***Donor Information* New Entity Joint with spouse/partner**

Advance ID#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Appeal Code\_\_\_\_\_\_\_\_\_\_ Proposal #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor’s Full Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor’s Full Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Contact name if business entity \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address type: Home Business Seasonal

Other (specify type) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ID#\_\_\_\_\_\_\_\_\_\_

 Other Associated Donors Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ID#\_\_\_\_\_\_\_\_\_\_

 Honorary/Memorial Donor Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ID#\_\_\_\_\_\_\_\_\_\_

***Allocation Information* Total Gift/Pledge Amount \_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |
| --- | --- | --- |
| Allocation Code | Allocation Name | Amount |
|   |   |   |
|   |   |   |

**Premium Information**

Non-deductible (quid pro quo) Amount \_\_\_\_\_\_\_\_\_\_\_\_Premium Description\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Special Gift Instructions**

Is gift Anonymous? *Circle one:* Show name, not amount; Show amount, not name; Don’t show name or amount

Is the gift eligible for matching? Yes

*Use next page for pledge information*

**Pledge Information**

Pledge Type – *Circle one*: Annual Giving Pledge, Annual Athletic Pledge, Straight Pledge, Bequest Expectancy, Other\_\_\_\_\_\_\_\_\_\_\_\_

Payment Frequency - *Circle one and specify details below*: Annual, Monthly, Quarterly, Open, Other\_\_\_\_\_\_\_\_\_

Payment Amount \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date of 1st Payment \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Payment Schedule details\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

First Payment Attached

**Special instructions for pledge reminders:**

Do not send reminders (Donor requested)

Do not send reminders (Advancement requested)

**Please complete BOTH sides of this form as applicable.**

**Incomplete information may cause a delay in processing.**

Forward completed form to:

James Madison University

Advancement Gifts & Records,

1031 Harrison Street - MSC3603

Harrisonburg, VA 22807

Attach all documentation with form (originals required).

Questions? Contact Advancement Gifts & Records advancementgr@jmu.edu or 855-568-4483 (855-JMU-GIVE)

**ADVANCEMENT GIFTS AND RECORDS USE ONLY**

Received By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Received:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Updated 1/27/2021 DSJ