**ATLAS New Designation Request Form**

This form is to be completed in conjunction with the BEN Financials New Fund Request Form. Complete all requested information and return to Investment Services at 300 FMC Building. Please direct any questions concerning changes to existing funds to [FUNDS@lists.upenn.edu](mailto:FUNDS@lists.upenn.edu) or Pat McAlorum at extension 8-1547.

|  |  |  |  |
| --- | --- | --- | --- |
| Name: | Date: | Ext: | Email: |

Create New Designation  Add to Online Giving

Create New Generic Designation (GL String Required)

CNAC: \_\_ \_\_ \_\_ ORG: \_\_ \_\_ \_\_ \_\_ BC: \_\_ FUND: \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ OBJT: XXXX PROG: \_\_ \_\_ \_\_ \_\_ CREF: \_\_ \_\_ \_\_ \_\_

|  |  |
| --- | --- |
| **Designation Name**  **(Limit 30 Characters)** |  |
| **Formal Name**  **(Will appear on donor receipts)** |  |
| **Description:**  **(purpose of the fund)** |  |

|  |  |  |
| --- | --- | --- |
| **Fundraising Unit:** | **Fundraiser:** | **Giving Clubs:** |

|  |  |  |
| --- | --- | --- |
| **Benefitting Unit 1:** | **Percentage:** | **Effective Date:** |
| **Benefitting Unit 2:** | **Percentage:** | **Effective Date:** |
| **Benefitting Unit 3:** | **Percentage:** | **Effective Date:** |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Relationships:** | | | | | |
| **Name** | **ID** | **Relationship** | **Beneficiary Code** | **Start Date** | **End Date** |
|  |  |  |  |  |  |
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|  |  |  |  |
| --- | --- | --- | --- |
|  | **Initiative Type** | **Code** | **Description** |
|  | **Objective Priority** (Required) |  |  |
| ☐ | **Priority** |  |  |
| ☐ | **Priority** |  |  |
| ☐ | **Priority** |  |  |
| ☐ | **Priority** |  |  |
| ☐ | **Priority** |  |  |
| ☐ | **Priority** |  |  |

For GAA use only

Completed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_