



Purpose - Use this form to request for non-research related transfer involving the endowment gift.

Campus (UBCV or UBCO)	Direct Queries To	Cost Center	Phone	Email
Authorization Signature of Source Program/ Project/ Gift/Grant		Print Name		Date

Description of Transfer (Attach Supporting Documents)

Fund Transfer From (Source Fund & Program/ Project/ Gift/ Grant)

Fund	Cost Center	Program/ Project/ Gift/ Grant	Program/ Project/ Gift/ Grant Name	Function

Endowment Capital Endowment Spending
 \$ _____ \$ _____

Non-Endowment Fund - Restricted Non-Endowment Fund - Unrestricted *
 \$ _____ \$ _____

Fund Transfer To (Destination Fund & Program/ Project/ Gift/ Grant)

Fund	Cost Center	Program/ Project/ Gift/ Grant	Program/ Project/ Gift/ Grant Name	Function

Endowment Capital Endowment Stabilization Endowment Spending
 \$ _____ \$ _____ \$ _____

Non-Endowment Fund
 \$ _____

Additional approval for the following three circumstances:

1) **Encroachment where the transfer is from an endowment gift Capital Account - Policy 4.3**
 Approval of the Board of Governors on the recommendation of the President
 Donor approval where applicable

2) **Capitalization of an endowment gift unspent allocation to its Capital Account or Stabilization Account - Policy 5.3**
 Note: Capitalization is normally avoided as it results in favouring future beneficiaries over present beneficiaries. However, circumstances may arise where it is desirable to build the Capital Account of an endowment gift.

Signature of Provost/Vice Provost, DVC or VP	Print Name	Date

3) **Transfer of unrestricted monies* to an endowment gift Capital Account or Stabilization Account - Policy 6.4**
 Note: If the recipient endowment gift is subject to trust obligations, approval from Office of University Counsel is required. In all cases where unrestricted monies are transferred to the Capital or Stabilization Account, approval of the Provost/Vice Provost, DVC or VP is required.

Signature of Provost/Vice Provost, DVC or VP	Print Name	Date

If the recipient endowment gift is subject to trust obligations

Signature of University Counsel or designate	Print Name	Date

*Unrestricted monies include funds with no external restrictions in Program, Project, Gift and Grant.

Document Routing:

- 1 Where no additional approval is required, please forward the form to Endowment Accounting directly.
- 2 If additional approval is required, please forward the form to Endowment Accounting after the approval is obtained.
 - 1) Encroachment - Please contact the Office of the University Counsel to obtain Board of Governors approval and contact the Development Office to obtain donor approval where applicable.
 - 2) Capitalization of unspent allocations - Please contact the appropriate Office of the Vice President to obtain approval.
 - 3) Transfer of unrestricted monies to an endowment gift Capital and Stabilization Account - Please first route the form to the Office of the University Counsel with a copy of Term of Reference, Deed or Trust Agreement. Office of the University Counsel will then forward the request to the appropriate Office of the Vice President for approval.