

CSUSB FOUNDATION

Building a Culture of Philanthropy

New

EXPENDABLE ACCOUNT FORM

Update

Please complete all sections and return to University Advancement Services

Date:	Development Officer Name:			
Account/Scholarship Name:				
Donor(s):			AdvanceID:	
Add'l Stewardees:			AdvanceID:	
Source of Funds:	New Gift	Existing	Transfer	Department Code:

Scholarship Info/Financial Aid *Enter N/A if not applicable*

Aid Year:	# of Students:	Campus:	Enrollment Status:
Degree Level:		Class Level:	GPA:
College:	Major:		
Financial Need:	Renewable:	Donor Thank You Letter:	
Scholarship Committee:		Contact Name:	

Additional Criteria/Notes:

Notes for Financial Aid:

Transfer Instructions *(If needed)*:

Current Account Location:		Transfer Amount:	
New Account Location:			

Notes/Instructions for Financial Services:

Notes/Instructions for Advancement Services:

Acknowledgement Signatures

Administrator/Department Head

Robert Nava
CSUSB Philanthropic Foundation Executive Director

Print Name

Financial Services / Student Financial Services Only:

Approved: _____ Date: _____

Expendable Scholarship: (P30) _____

Student Financial Item Type Number: _____

Financial Aid Only:

PeopleSoft Created: _____
Initial Date

NextGen Created: _____
Initial Date

Scholarship Name: _____