



NEW ACCOUNT SETUP PROCESS

Please follow the below steps to establish a new account/project within University Foundations:

STEP 1: GENERATE A GIFT AGREEMENT

Using the applicable gift agreement template in Blackboard, make any needed adjusts and add any purpose specifications to the document. Once you have finalized the draft gift agreement, email the document to the following individuals for approval:

TO: Eleanor Foster Swarat, Esquire – efswarat@mailbox.sc.edu (777-3300)
Associate Vice President for Development
Legal Liaison to University Foundations

Once the draft version has been approved, you may proceed with routing the original gift agreements (please see attached Gift Agreement Notes document) for signatures and continue to STEP 2.

STEP 2: COMPLETE THE NEW ACCOUNT REQUEST FORM

Complete the New Account Request Form based on the attached example. (This form can be found on the Foundation's website at <https://www.uofscfoundations.org/educational-foundation/university-employees/form-center>.)

Once you have completed the New Account Request Form, continue to STEP 3.

STEP 3: REQUEST A NEW ACCOUNT

To establish a new account with University Foundations, email the *approved draft gift agreement* and the *completed New Account Request Form* to the following:

TO: Elizabeth Kovalchek – BrockEA@email.sc.edu (777-6684)
Assistant Project Manager, University Foundations

CC: Lindsey Fisher – LFisher@mailbox.sc.edu (777-1826)
Administrative and Records Manager, University Foundations

Once your email is received and reviewed, the Foundations will:

- **Open a new account in Financial Edge, if applicable** (University Foundations' Accounting System - departmental users can access this information via the online Reporting Xpress System)
- **Notify Development to open a corresponding project in Millennium** (USC Gift Processing's Donor Database)

The department and DOD will then be notified with the new account information once it has been established.

STEP 4: DISPRIBUTE THE FULLY EXECUTED GIFT AGREEMENT

Once the original fully executed gift agreements have been signed by all parties, please distribute as follows:

Original #1: Donor (if there is one specific donor)
-OR-
Department (if there is no one specific donor)

Original #2: Lindsey Fisher
University Foundations
1027 Barnwell Street
Columbia, SC 29208

Original #3: Only applicable for Naming Opportunities