



## Pledge Transmittal

### Legal Constituent Details:

Full Name: \_\_\_\_\_ PID: \_\_\_\_\_

Address (if new donor or updated info): \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### Recognition Credit Details:

Full Name: \_\_\_\_\_ PID: \_\_\_\_\_

Full Name: \_\_\_\_\_ PID: \_\_\_\_\_

Address (if new donor or updated info): \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Relationship to Legal Donor: \_\_\_\_\_

### Pledge Details:

☐ Initial payment enclosed

☐ Pledge is Anonymous

Total Pledge Amount \$ \_\_\_\_\_

☐ Pledge\*

☐ Intent\*\*

☐ UDO Reminds

Design (6 digits)

Description

Amount

Appeal Code

		\$		
		\$		
		\$		
		\$		

**Prospect Plan Details:** If pledge is associated with a Prospect Plan, mark the Opportunity **accepted** before submitting.

Plan Name: \_\_\_\_\_

Plan Manager: \_\_\_\_\_ Original Ask Amount: \_\_\_\_\_

\*A **countable pledge** is a pledge that qualifies to count in fundraising totals. These are personal pledges from individuals or entities that will not be paid, in whole or in part, by a donor advised funds or private foundation. If one or more payments will be made by a private foundation, the pledge documentation must come from the private foundation, not the individual.

\*\*An **Intent** will not count in fundraising totals because the donor intends to make grants through a donor advised fund. These commitments can be set for reminders. The grant made by the DAF will count in fundraising totals at the time it is received.

Submitted by: \_\_\_\_\_ School/Unit: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_ Date: \_\_\_\_\_

Comments/Notes: \_\_\_\_\_

### Gift Services Use Only

☐ Pledge: Reminders: Y / N

Reminded by: DEV / Other \_\_\_\_\_

Start Date: \_\_\_\_\_

☐ Intent: Reminders: Y / N

Reminded by: DEV / Other \_\_\_\_\_

Start Date: \_\_\_\_\_

☐ Pledge-recurring method:

Paid by: \_\_\_\_\_

Start Date: \_\_\_\_\_

End Date: \_\_\_\_\_

☐ Recurring gift:

Paid by: \_\_\_\_\_

Start Date: \_\_\_\_\_

Publicity Noted on Form:

☐ Sent to Development Communications

Recognition Noted on Form:

☐ Sent to Development Stewardship:

Date added to Davie: \_\_\_\_\_

By: \_\_\_\_\_