



## Information to be Provided to LSU Foundation Legal Office

### Pledge Agreements

- Name and address of Donor(s)
- Beneficiary Unit
- Name of the Fund (Account # is optional)
- Donation Amount (this is the amount being donated by the Donor, *exclusive* of any matching funds)
- Gift Purpose Restrictions – for a new account this information will need to be supplied; for funds being donated to an existing account, you need only reference the existing account name
- Pledge payment terms (frequency, amount of payments, scheduled payment months, etc.)
- Date of final pledge payment
- Any additional restrictions or notes

Once the Pledge Agreement has been approved by the LSU Foundation Office and returned to the beneficiary unit, the agreement should be sent to the Donor(s) for review and signature. Once signed by the Donor(s), the agreement should be routed to the Dean of the beneficiary unit for signature and then to the LSU Foundation's legal office for the President/CEO's signature.

### Donor Agreements

- Name to be used for title of agreement
- Indication if Endowed or Non-Endowed
- Name of Donor(s) or Donor Representative in cases with multiple Donors; Name and title of the Donor Representative in instances with corporate/company donations
- Indication if there is a pledge involved or if the gift is to be made at the time the agreement is executed
- Amount of donation
- Beneficiary college/unit/program
- Any restrictions as to the beneficiary purpose
- Any selection criteria requested by the Donor(s), if applicable

Once the donor agreement has been approved by the LSU Foundation Office and returned to the beneficiary unit, the agreement should be sent to the Donor(s) for review and signature. Once signed by the Donor(s), the agreement should be routed to the Dean of the beneficiary unit for signature and then to the LSU Foundation's legal office for the President/CEO's signature.



### **Professional Service Contracts**

Please check the link below on the LSU Foundation website or contact the LSU Foundation's legal office if you have questions about which professional services require a Board-approved contract:

[http://www.lsufoundation.org/Resources/Files/Policies/Professional\\_Service\\_Contracts.pdf](http://www.lsufoundation.org/Resources/Files/Policies/Professional_Service_Contracts.pdf)

PLEASE NOTE: Any services which require a Board-approved contract as stated in the Foundation's Operating Policies and Procedures (see above) require approval of the LSU Foundation's Board BEFORE contractors proceed with work. The Foundation will not be responsible for payment of any services performed which have not been approved by the Foundation Board.

- Name and address of Contractor
- Confirmation that the Contractor is not a University employee
- Name and title of person who will sign on behalf of the Contractor
- Tax ID Number or Social Security Number (if a new vendor/contractor)
- Indication if Contractor is not a U. S. citizen or U. S. entity
- Name of specific beneficiary unit or program
- Scope of services to be performed and description of any deliverables
- Fee to be paid to Contractor and terms of payment
- Term of contract (start and end dates)
- Indication of whether reimbursable expenses are to be included; and, if so, the maximum amount reimbursable over the term of the contract
- Foundation Account Number from which the contract will be funded
- Documentation of Dean's approval to proceed with the contract