**INSTRUCTIONS FOR SBF ACCOUNT APPLICATION**

1. **Type of Account:** Please check the appropriate box. Please be advised that there is a $100,000 minimum deposit required to establish an Endowment account.
2. **Title of Account:** This is the name of the account. We ask that you limit this field to 40 characters.
3. **Purpose of Account:** This should be a brief description on how the funds will be spent.
4. **Donor Restrictions:** Please indicate if there are any donor restrictions on the use of the funds.
5. **Sources of Funds:** Identify the source(s) of the contributions.
6. **Account Director:** Person responsible for the account. The person must be an employee of the University at Stony Brook, the Research Foundation, or of a corporation with Trust and Agency status.
7. **State Parent Account Number:** This field is required to do All Funds reporting for the University. The number can be obtained from your VP Coordinator. **SBF will not issue an account number without this information.** If you need to assign more than one state parent account number, please indicate the additional state parent account number(s) and provide the percentage of each account for a total of 100%.
8. **Account Director Signature:** The signature of the account director.
9. **Additional Authorized Signature:** We request that there is at least one additional designated person authorized to approve transactions on the account. This person must be an employee of the University at Stony Brook, the Research Foundation, or of a corporation with Trust and Agency status.
10. **Report Recipient:** The person designated to receive monthly accounting reports. The report recipient can be a person other than the Account director or additional authorized signatory. The report recipient’s email address must be included
11. **Approvals:** For academic departments, please obtain your Department Chair, Dean and Provost Signatures before forwarding the account application to SBF. For administrative departments, please have your Supervisor and Area Vice President’s signature before forwarding the account application to SBF.
12. **Fundraising Activity Account:** Any new account that will require additional funds to be raised for the account to reach its desired status. Such account will require the signature of the Department Chair acknowledging that a fundraising plan has been discussed and approved by the Director of Advancement in that unit or the Assistant Vice President of Advancement.