



New Account Application Process

During this time of complex challenges due to the COVID-19 pandemic, the Stony Brook Foundation has agreed to handle the new Account Application (Long Form) process in the following way until further notice.

1. **OPTION A** – If the Account Manager, Chairperson and Dean are readily available (i.e. on campus), SBF would prefer that original signatures are still obtained on the application form. Once signed by all parties, the account application can be scanned and emailed to the Foundation at kristin.perrichon@stonybrookfoundation.org
2. **OPTION B** – If it is prohibitive to obtain original signatures from the Account Manager, Chairperson or Dean, please adhere to the following process:
 - **Step One** - First send an e-mail to the Account Director seeking their electronic approval of the account application
 - Include the following language in the body of the e-mail to the Account Manager:
 - *I have read the policies and procedures of the Stony Brook Foundation that pertain to this account. By this e-mail, I agree to comply with donor restrictions and SBF policy and procedures*
 - **Step Two** – Once you have gotten the e-mail approval back from the Account Manager, forward that same email on to both the Chairperson and Dean seeking their electronic approval of the account application
 - Include the following language in the body of the e-mail to Chairperson and Dean:
 - *My e-mail indicates that the intended use of this account is consistent with the mission of Stony Brook University*
 - **Step Three** - Once you have secured the e-mail approval by all parties, send the complete e-mail thread and a scanned copy of the account application to the Foundation at kristin.perrichon@stonybrookfoundation.org

KEY NOTE - Upon returning to normal office operations, the Account Manager/Advancement Officer who requests a new account will be responsible for obtaining all original signatures on the Account Application Form within 60 days.