

**Gift Letter & Requirements**

**Step 1: The person giving you your gift, the Donor, must complete and sign the “Gift Letter” below. Your signature is also required.**

**Step 2: Additional Donor Requirements - Source of gift funds - provide the following:**

* A copy of the gift check OR wire transfer form showing gift amount transferring out of account
* A copy of the bank statement showing gift withdrawal OR a bank printout that is stamped and signed by the bank showing gift withdrawal
* A copy of the bank statement showing gift funds clearing as well as a 30 day history prior

**Step 3: Additional Client Responsibilities - Transfer of gift funds - provide the following:**

* A copy of the bank statement showing the gift being deposited with the funds showing as available in the balance