Western

REMITTAL FORM

Advancement Operations
Westminster Hall
Email: donationrevenue@uwo.ca
Phone: 519-661-2111 x85321
Fax: 519-661-4182

1. CONSTITUENT INFORMATION

Name: _____ BBCRM ID: _____

Recognition Name: _____

Anonymous? ◯ YES ◯ NO Soft Credit? ◯ YES ◯ NO Soft Credit ID: _____

For Contributions from Corporations:

Org. Contact: _____ Contact Address: _____

2. PAYMENT INFORMATION ☐ N/A

DO NOT SEND Credit Card information via inter-campus mail, email, or on this form. To submit CC information please call PCI cellphone @ 226-559-4080.

Type: Payment Amount: _____

Revenue ID # (if applicable): _____ Credit Card – Set as Recurring ☐ YES

3. NEW PLEDGE INFORMATION ☐ N/A

Pledge Total: _____ Installment Amount: _____ No. of Installments:

Start Date: _____ Frequency: Reminder Type:

4. OPPORTUNITY INFORMATION ☐ N/A

Solicitor Revenue can only be added if an Opportunity Exists.
If an Opportunity does not already exist, AVP Dev. approval required to add retroactively.

Site (Faculty/Division): _____

Status updated to ACCEPTED: ☐ YES

Accepted Amount: _____ Response Date: _____

Solicitor(s) Revenue: _____

5. ALLOCATION INFORMATION

Is there an Agreement? ◯ YES ◉ NO

If this is for a new pledge and there is no agreement, written confirmation from the Donor must be also be attached to the JIRA Ticket.

Agreement Type: ☐ Donation ☐ Sponsorship ☐ Grant (Non-Research) ☐ Grant (Research)

Fund Name (Required):_____ Fund Type (Required):

Project/Speed Code (If Known): _____

6. SUBMISSION INFORMATION

Submitted by: _____ Date Submitted: _____ Email: _____ Ext. #: _____

COMMENTS

The Remittal is complete. Please submit via a JIRA request under the Finance section.

FOR ADVANCEMENT OPERATIONS USE ONLY

Processing Specific:

Gift Date: _____ Application: _____ Inbound Channel: _____

Pay Method: _____ Rev-category: _____

Designation: _____

Receipt Type: _____

Pledge Specific:

Reminders: ◯ YES ◯ NO Expected Pay Method:

Pay Method Update: ◯ YES ◯ NO

Securities Specific:

Name of Security: _____

No. of Shares/Units Received: _____ Price Per Share/Unit: _____ Exchange Rate: _____

DATE RECEIVED by ADVANCEMENT OPERATIONS: _____

Note: The remittal and the payment (if applicable) must both be received to complete this date field.

OFFICE USE COMMENTS: