ANONYMITY FORM for ENDOWMENTS

Gift officer: As you know, **anonymous** means different things to different people. In order to make sure that donors’ wishes are understood, please use this form to define and document expectations regarding anonymity at Duke. Submit a copy of this form by email to ADR (gifts2duke@duke.edu) and to Donor Relations (dev-drelations@duke.edu).

<table>
<thead>
<tr>
<th>Donor:</th>
<th>DADD entity ID:</th>
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<td>Donor:</td>
<td>DADD entity ID:</td>
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<tr>
<td>Endowment:</td>
<td>Fund code:</td>
</tr>
<tr>
<td>Development staff member submitting this form:</td>
<td></td>
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<tr>
<td>Area/Department/Office:</td>
<td>Date:</td>
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**PART 1: INFORMATION for ADR**

Does the donor wish his/her gift(s), pledge(s), and/or payment(s) to be anonymous? 

Does the donor’s entity status need to be marked as anonymous?

**PART 2: INFORMATION for DONOR RELATIONS**

**ENDOWMENT AGREEMENT**

Does the endowment agreement note that the endowment is anonymous?

What are the details regarding the ENDOWMENT NAME? If the endowment name reveals the donor’s name, the endowment agreement should note the alternate anonymous endowment name if possible. Please vet this name through Donor Relations to ensure that the alternate anonymous endowment name is not already in use at Duke for another anonymous endowment.

Does the endowment agreement note CONDITIONS/TIME LIMITS regarding anonymity?

What are they?

**ENDOWMENT REPORT**

Does the donor wish to receive an annual endowment report once the endowment fund activates?

**PUBLICITY**

Does the donor wish that the endowment be recognized in Duke publications or online?

If yes, what name should be used?
EVENTS

Would the donor like to be invited to events? ________________________________

If yes and if there is a beneficiary, would the donor like to be seated with the beneficiary? ______

STUDENT SCHOLARSHIP RECIPIENT RELATIONSHIP/COMMUNICATION

Donor Relations may provide a description of the donor and the scholarship to student scholarship recipients for the purpose of encouraging students to write you thank-you notes. Please choose one:

_____ Do not provide a description for students. This donor does not want thank-you notes.

_____ Do provide a description and refer to the donor as merely “the donor” because he/she would like to remain anonymous yet also hear from the students.

PROFESSORSHIP/FACULTY RECIPIENT RELATIONSHIP/COMMUNICATION

Regarding communication with faculty benefitting from this endowment, please choose one:

_____ Do not refer to donor by name because he/she prefers to remain anonymous.

_____ Do refer to donor by name. He/She would like to meet/communicate with the recipient.

HONOREE RELATIONSHIP/COMMUNICATION

If this endowment is established in honor or in memory, please describe the donor’s relationship with the honoree. ________________________________

How would the donor like the honoree, if living, to be stewarded?

_____ The honoree should receive a report on the endowment, including financials and fund use.

_____ The honoree should receive a report on the endowment, including fund use only. The financials are confidential.

_____ The honoree should receive invitations to events.

_____ The honoree should have the opportunity to meet with or hear from those who benefit from the endowment.

ADDITIONAL INFORMATION

Please share information below related to stewardship that may not have been addressed above:

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Updated September 2017, Donor Relations