



NEW ACCOUNT SETUP PROCESS

Please follow the below steps to establish a new account (project) within USC Foundations:

STEP 1: GENERATE A GIFT AGREEMENT or UNENDOWED PROJECT AGREEMENT

Endowed Projects:

Using the applicable gift agreement template in Blackboard, make any needed adjustments and add any purpose specifications to the document. Once you have finalized the draft gift agreement, email the document to the following individuals for approval:

TO: Eleanor Foster, Esquire – e.foster@sc.edu (777-3300)
Associate Vice President for Development
Legal Liaison to University Foundations

Unendowed Projects:

Complete an [Unendowed Project Agreement](#) for unendowed projects.

*Note: A gift agreement can always be used in lieu of the Unendowed Project Agreement

STEP 2: COMPLETE THE NEW ACCOUNT REQUEST FORM

Complete the [New Account Request Form](#) for use by USC Advancement Services when opening the account in CRM.

STEP 3: REQUEST A NEW ACCOUNT (PROJECT)

To establish a new account (project) with USC Foundations, email the either an *approved draft Gift Agreement* or a completed **Unendowed Project Agreement** and the completed **New Account Request Form** to the following:

TO: Lindsey Fisher – LFisher@mailbox.sc.edu (777-1826)
Administrative Manager, University Foundations

Once your email is received and reviewed, the Foundations will:

- **Open a new project in Financial Edge** (University Foundations' Accounting System - departmental users can access this information via the online Reporting Xpress System)
- **Notify USC Advancement Services to open a corresponding account in CRM**
- **Notify the department with the new account (project) information**