

Return To: Gail Kurtz, Investments and Endowment Management (Mail Stop Code 5235)

From:

Date:

Re: Profile of Persons Designated to Act on Behalf of the Department and/or College as Administrator of the Endowment

Endowment Title:

Fund 54 Department Number:

Signature of Person Completing this form:

To assign the contact/administrator for your department's endowment(s), please complete and return this form to Gail Kurtz.

Completion of this form assigns administrative responsibility for the endowment. It is necessary to provide an updated copy to Investments and Endowment Management each time there is a personnel change. Complete information must be provided for each person designated. Each assigned person must be a University employee.

The Endowment Management System (EMS) website is the source through which you can view the endowment's financial transaction history, current and historical market values, and submit distribution requests. Although, only **one person per endowment shall be authorized to request spendable dollar distributions via the EMS, additional persons may be assigned web access to view the endowment's financial status.** The EMS web address is: <http://www.endowment.wmich.edu/login.aspx>. In addition, **one or two persons per endowment are to be assigned as contacts (page 3).**

Please return the completed form to Investments and Endowment Management via email (gail.kurtz@wmich.edu), or facsimile (7-4155). If you have questions, do not hesitate to contact Gail at 7-4239.

\* **Person Authorized to Submit Endowment Draws/Distributions via EMS Web-site, this authority includes "View" authority:**

Department Name:

Last Name:

First Name:

Middle Initial:

WMU Email Address:

Campus Phone Number:

Facsimile Number:

Endowment Title:

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\* Person Authorized to Access EMS Web-site to View Endowment Information:

Department Name:

Last Name:

First Name:

Middle Initial:

WMU Email Address:

Campus Phone Number:

Facsimile Number:

\* Person Authorized to Access EMS Web-site to View Endowment Information:

Department Name:

Last Name:

First Name:

Middle Initial:

WMU Email Address:

Campus Phone Number:

Facsimile Number:

Endowment Title:

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**Contact Person(s):**

You may designate both a primary and a secondary contact (person to whom questions and communications are directed regarding the endowment).

Primary Contact:

Department Name:

Last Name:

First Name:

Middle Initial:

WMU Email Address:

Campus Phone Number:

Facsimile Number:

Secondary Contact:

Department Name:

Last Name:

First Name:

Middle Initial:

WMU Email Address:

Campus Phone Number:

Facsimile Number:

Endowment Title:

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