

UNIVERSITY OF FLORIDA FOUNDATION, INC.
POST OFFICE BOX 14425
GAINESVILLE, FL 32604

**SOURCE OF FUND (SOF)
INFORMATION FORM (UFF-A)**
SUBMIT TO:
UF FOUNDATION FINANCE OFFICE
392-5971

New SOF Request

SOF Change Request (highlight changed items)

Close SOF Request

Date: 11/17/2023
mm/dd/yyyy

F028197/98

SOF Name: Guthrie Family Endowed Scholarship SOF#: _____

Administrator Name: Michael Reid 6917 Title: Dean, Professor

Campus Telephone & Extension: 352 294-1614 Campus Box #: 118200

SOF's College/Unit: HHP/ Dean's Office SOF's Dept. ID: 26010000

Should this SOF appear on the public giving website for solicitation? Yes No

Additional UFLOR Chartfield Information Required for Transfers to UF:

Fund _____ Program _____ Flex _____ Employee ID _____ Project # _____

Is this an endowment (with a minimum of \$30,000): Yes No

Is the Gift Agreement Completed Out for signatures Draft only Will/Trust

Type of gift and amount to be deposited: \$35,000 in \$7,000 payments between 12/2023 - 12/27

** Purpose (See gift agreement):

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C

Endowed spendable income for student support, undergraduate restricted to HHP, Dept of THEM. GPA of 3.0 or better, with preference given to first generation college students.

Prepared By (Print): Melissa Cunningham E-mail Address: cunningham.m@ufl.edu

Administrator Signature: Lesley Watt E-mail Address: lthurston@ufl.edu

* Dean/Director or VP Appr: Michael Reid E-mail Address: michael.reid@ufl.edu

UFF Executive VP Approva: [Signature]

* New Fund Administrators or replacements for current Fund Administrators are appointed by the Dean, Director or Vice President. This form must have the signature of the Dean, Director or Vice President before it is submitted to the Foundation for processing. If the Fund Administrator will be the Dean or Director, the appropriate Vice President must sign. If the Vice President is to be the Fund Administrator, the President must approve.

** Identify the type of activity this SOF is intended to support and any donor restrictions on its use, i.e., unrestricted to a college, restricted to department, student financial aid, faculty and staff support, research facilities, or other. Attach copies of all relevant donor correspondence. Be specific.

NOTE: Incomplete forms or those without proper approval signatures will be returned to the Fund Administrator, possibly resulting in delays in processing your request or access to funds.

Date Entered: 11/21/2023 By: ts Effective Date: 11/01/2023

Received 11/21/2023



UNIVERSITY of FLORIDA FOUNDATION

CONFIDENTIAL DOCUMENT

THE MARIA B. GUTHRIE AND WILLIAM C. GUTHRIE GIFT AGREEMENT

This Agreement is between Maria B. Guthrie and William C. Guthrie (Donors) and the University of Florida Foundation, Inc. (Foundation), on behalf and for the benefit of the University of Florida (University).

Pledge

The Donors pledge to make a gift to the Foundation of \$35,000 (Gift).

Fund Purpose

The Foundation agrees to create and manage the fund listed below.

Amount: \$35,000

New Fund Name: Guthrie Family Endowed Scholarship

Fund Purpose: Endowed spendable income for student support, undergraduate restricted to College of Health and Human Performance, Department of Tourism, Hospitality, and Event Management

Additional Criteria: GPA of 3.0 or better. Preference shall be given to first generation college students.

Schedule of Contributions

The Donors will make payments as outlined below:

\$7,000 on or before **12-31-2023**

\$7,000 on or before **12-31-2024**

\$7,000 on or before **12-31-2025**

\$7,000 on or before **12-31-2026**

\$7,000 on or before **12-31-2027**

Recognition

The Gift may be noted in future University publications. Formal press releases or specific articles will be submitted to the Donors for approval. All other information regarding the Gift will remain confidential.

Legacy Statement

The donors are compelled to make this gift to support students who are first in their families to attend college because they were also the first in their families to attend college.

Administration

The Foundation will manage the Fund for the purpose described above in accordance with applicable law and the policies of the Foundation (www.uff.ufl.edu/documents), which are modified from time to time. The Foundation's policies include, but are not limited to, policies for minimum amounts for certain types of gifts, development investment fees, endowment fees, investments, and management of endowment funds, which are permanent investments that generate spendable income to provide support in perpetuity.

If at some time in the future, the Fund cannot be usefully, practically, or lawfully applied to the above purpose because of circumstances that are currently unforeseeable, then the Foundation may modify the Fund's purpose in a manner that aligns as closely as possible to the Donors' original intent, after consultation with the Donors if available. The Foundation's assessment of whether a modification is appropriate will be consistent with Florida's Uniform Prudent Management of Institutional Funds Act in section 617.2104, Florida Statutes, including the terms "unlawful, impracticable, impossible to achieve, or wasteful."

The Donors plan to fulfill this pledge during the Donors' lifetimes. However, should a balance remain at the time of the death of the Donors, the Donors wish that the balance remaining on the pledge be considered an estate debt to be paid out of the Donors' estate assets.

If the pledge is fulfilled by transferring noncash assets such as closely held stock or real estate, then the Foundation will sell the assets and apply the net proceeds, less any costs, to the purpose described above and to meet minimum gift requirements, if any.

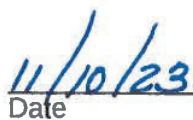
Foundation Qualification

By letter dated May 16, 1979, the Internal Revenue Service declared the University of Florida Foundation, Inc. to be a charitable organization under section 501(c)(3) of the Internal Revenue Code. The Foundation is a Florida nonprofit corporation and a Direct Support Organization for the University of Florida under section 1004.28, Florida Statutes. The federal tax identification number for the Foundation is 59-0974739.

The Donors and representatives of the University and Foundation have executed this Agreement on the dates indicated below:



Maria B. Guthrie



Date

William Guthrie

William C. Guthrie

11/10/23

Date

University of Florida

Michael Reid

Michael Reid, Dean
College of Health and Human Performance

11/16/2023 | 3:04 PM EST

Date

University of Florida Foundation, Inc.

Maria Gutierrez Martin

Maria Gutierrez Martin
Vice President for Advancement
University of Florida

11/16/2023 | 3:10 PM EST

Date