**Donor Information and Resources**

To reduce UC Santa Barbara’s impact on the environment, avoid printing costs, and provide prospective donors with the most up-to-date tools and information for giving, UC Santa Barbara has posted this information online. These statements will inform you of how your contact and donor information may be used, the governance of the Foundation, the application of administrative fees, and the management of endowed funds.

**Tax Identification Numbers**

The Tax ID number for the UC Santa Barbara Foundation is 23-7314834. The Tax ID number for The Regents of the University of California, Santa Barbara Campus is 95-6006145. Typically, annual unrestricted gifts are processed through the UC Santa Barbara Foundation and current-use gifts designated for specific schools or units are administered by The UC Regents. Endowments, capital project, or other special purpose donations may be processed through either legal entity. Please call Gift Administration at (805) 893-5556 to obtain the proper Tax ID number and/or copies of IRS Determination letters. We are also eligible for favorable tax treatment in Canada and the European Union. Please call (805) 893-5556 for more information.

**Privacy Notice**

The 1977 California Information Practices Act requires UC Santa Barbara to inform individuals asked to supply information about themselves of the following: UCSB is requesting this information to update the general resource files of its Division of Institutional Advancement. Furnishing the information is strictly voluntary and will be maintained confidentially. The information may be used by other University departments in the regular course of business, but will not be disseminated outside UCSB except if required by law.

You have the right to review your own data file. Inquiries should be forwarded to: Beverly J. Colgate, Director, Information Systems and Strategic Planning Phone: (805) 893-4968; Fax (805) 893-5562, beverly.colgate@ia.ucsb.edu

**Donor's Consent for Public Acknowledgment**

The university is grateful for the support it receives from alumni, parents and friends. One of the ways we express our thanks is by listing the names of donors in Web-based and/or print honor rolls. Should you wish that your name not appear as a donor, please notify John Hammond, Director of Donor Relations at (805) 893-3729, john.hammond@ia.ucsb.edu if you have not already done so.

**Fiduciary Responsibility of the UC Santa Barbara Foundation**

The UC Santa Barbara Foundation is a California non-profit, public benefit corporation organized for the purpose of encouraging and administering voluntary private gifts, trusts, and bequests for the benefit of the UCSB campus. Responsibility for governance of the Foundation, including investments, is vested in its Board of Trustees (Foundation governance must be in compliance with all Regental and UC systemwide policies and procedures).
Gifts directed to UC Regents endowments supporting UC Santa Barbara are managed by the Office of the Treasurer of the Regents. Please visit the following link for more information on Regental endowment investments and distributions. http://www.ucop.edu/treasurer/

**Administrative Fee on Gifts**
Beginning on July 1, 2010, all new gifts and all payments on new pledges (those pledges made after June 30, 2010) to either the UC Santa Barbara Foundation or The Regents of the University of California for the benefit of the Santa Barbara campus, will be subject to a one-time administrative fee to provide essential support necessary to UCSB's overall operation. The fee is currently 2%.

**Donor Advised Funds**
Gifts for which a donor is entitled to receive any return benefits, (such as athletic ticket preferences, tangible goods or “premiums”, meals and event tickets) may not be paid by a Donor Advised Fund.

**Endowments**
Endowment gifts are managed and invested in accordance with Foundation and University policies. The total return earned in excess of the amount approved annually for payout will be retained in the endowment principal to protect from the effects of inflation and to allow for growth. At the fund administrator’s discretion, when the payout is not needed for purposes of the fund, the payout may be added to the endowment fund principal. In the event the fund does not reach the endowment minimum; or the program ceases to exist at UC Santa Barbara, proceeds from the fund are used in an area and manner as closely related as possible to the original intent and purposes for which the fund was established.

For additional information please contact Donor Relations at (805) 893-3729.