



TRANSFER PROCESSING FORM

This form should be used by grantees wishing to transfer a grant from one organization to another.
Please consult with program staff prior to submitting this form and accompanying documentation.

Transferring Organization Legal Name:

Receiving Organization Legal Name:

Program Staff Member Consulted:

Grant Amount:

Reference #:

Current Remaining Balance:
(Including Interest Earned)

As of:

(MM/DD/YY)

Complete If Also Requesting an Extension of the Grant

Original Grant End Date:

Requested Grant End Date:

Select the primary reason that
unexpended funds remain:

Specify reason if "Other":

Checklist of Required Documentation:

To Be Completed By:

A **narrative report** covering activities since the previous interim report, with a description of remaining activities and a justification of the revised timeline if an extension is also being requested.

**Principal
Investigator**

A **letter** requesting and/or agreeing to the transfer from a person with appropriate institutional authority.

A **financial report**, using your original "Budget and Financial Report" template (or "Revised Budget and Financial Report" template for previously modified grants), indicating the current balance of remaining funds on the grant and expenditures to date.

**Transferring
Organization**

A **letter** accepting the transfer and agreeing to all grant terms and conditions, from a person with appropriate institutional authority.

**Receiving
Organization**

A **revised budget**, using the Foundation's "[Revised Budget and Financial Report](#)" template, covering remaining activities from the date of the transfer request.