TIPS ON COMPLETING THE FORMS TO ESTABLISH AGENCY FUND:

**Questionnaire for Establishing Agency Funds (A&F Forms Page [https://af.nmsu.edu/forms/](https://af.nmsu.edu/forms/))**:

**Section 1:**
1) Requestor information of the person filling out the form to help us if we have any questions
2) The Requestor will need to sign in Section 1

**Section 2:**
1) Purpose—many organizations put something like track revenue & expenses
2) Source—might be dues, fundraising, donations, etc.
3) Index to be charged in event of a deficit balance—*you will need to get this Index # from your advisor*. If your advisor is not sure, his/her department business manager can assist. This cannot be an I&G or Restricted index.
4) How long will fund be needed—many organizations put “indefinitely”
5) Please have authorized persons print and sign
6) Please have your advisor(s) print and sign
7) If you want something specific done with any remaining funds after you are finished with the account, please specify here. Most organizations just use the funds
8) It is required that you submit a copy of your by-law with the Questionnaire.

**Section 4:** Advisor must sign for Official Approval.

**New Fund Number (A&F Forms Page [https://af.nmsu.edu/forms/](https://af.nmsu.edu/forms/))**:

The New Fund Number form is used for all types of NMSU accounts, so you, as a student organization, will not need to fill out all of it. Below we are providing a little information that will help you as you complete this form. *You will need to complete only the items listed below.*

1) It is an Unrestricted Fund

**Section 1:**
2) Requestor information of the person filling out the form to help us if we have any questions once it is filled in

**Section 2:**
3) Check mark Agency and in the drop-down choose Student
4) #7 & 8—Enter the name of your organization. It is best to use the full name of the organization to prevent confusion with other organizations in the future.
5) #9 is your Advisor’s name and info
6) #10 When you would like to open the Index
7) #11 Purpose—many organizations put something like track revenue & expenses
8) #13 Funding Source—might be dues, fundraising, donations, etc.
9) #15 There are two options for student organizations:
   a. The Agency Org # is **000002**, Org Name is **Agency**, Program # is **5000-Other**
   b. Or your advisor may prefer to use his/her organization number and name. Program # is **5000-Other**

**Section 3:** The advisor will sign & date for approval.

You do not need to complete any portion of the next page (page 3.)

If you have any questions, please call the Aggie Service Center at 646-2000 or email asc@nmsu.edu.