Managing Your Club’s Budget

A STEP-BY-STEP GUIDE FOR ALL STUDENT ORGANIZATIONS FUNDED BY THE GRADUATE STUDENT ASSOCIATION AT THE UNIVERSITY AT BUFFALO

Prepared by:
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Assistant Office Manager
Graduate Student Association
How to Make Purchases

Step 1: **Find out about your account**

- Stop by the GSA office at 310 Student Union and ask about your account balance. Gena Zimmerman or Stephanie George, the Office Managers are available Monday through Friday from 8:30am - 4:30pm. You may also e-mail either one at gmz@buffalo.edu or slfrank@buffalo.edu, or call the GSA office at 645-2960.
Step 2: Fill out an Encumbrance Request Form
(see sample attached)

An encumbrance request form is used to request funds from your budget to be set aside for purchases. Encumbrance requests **MUST be made 10 days prior to the purchase.** Any encumbrance turned in after this point may not be approved!

On the form you **must** include:

1) Name of the vendor (the person or company you are paying)
2) Address of the vendor including city, state, and zip code. If using a campus address, please include the department. Requests without a complete vendor address may be delayed.
3) Whether the check is to be picked up at GSA, 310 Student Union, or if the check is to be mailed to the vendor address.
4) Your name (club officer) where the form states ”requested by______” and an e-mail address or phone number where you can be easily reached.
5) A short, but complete description of the purchase including the date and location of the event. **No events may be held at a personal residence.** Any costs associated with an event found to be held at a personal residence will not be reimbursed.
6) A reasonable estimate of the cost.

Submit the Encumbrance request form to the GSA Office at 310 Student Union.

**PLEASE NOTE:** If you will be holding your event on-campus, and alcohol will be served, you must apply for and be approved for an Alcohol Permit in advance by completing the required form via the link below. Please allow at least two weeks for review.

[https://buffalo.collegiatelink.net/form/step/1?Guid=32d63259-69f8-42e9-9caf-46e802467f8a](https://buffalo.collegiatelink.net/form/step/1?Guid=32d63259-69f8-42e9-9caf-46e802467f8a)
Frequently Used Vendors that will Directly Bill GSA

- Wegman’s (cards can be signed out at either GSA office)
- Franco’s, Besta, Santora’s, or Zetti’s Pizzerias
- Staples or Eaton Office Supply (GSA will place the order)
- University Bookstore
- Three Pillars Catering or any Campus Dining and Shops (CDS) organization
- The UPS Store (UB Commons)
- Any vendor that is willing to accept a PO and invoice for goods or services
# GRADUATE STUDENT ASSOCIATION
## ENCUMBRANCE REQUEST FORM

**ALL INFORMATION MUST BE TYPED OR CLEARLY PRINTED**

Check Payable To:

Address:

<table>
<thead>
<tr>
<th>INSTRUCTIONS: Submit this form to the Graduate Student Association. All purchases must receive prior approval, i.e., funds must be encumbered before a purchase is made.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funds will then be encumbered and submitted to the GSA treasurer and Student Life for approval. Upon approval, Sub-Board I, Inc. will generate a Purchase Order (PO). Once GSA receives the official PO, the club president and treasurer will receive an email approval notification. The PO will be held in the GSA office.</td>
</tr>
<tr>
<td>After goods and/or services have been received and all necessary paperwork has been submitted, a check will be issued.</td>
</tr>
<tr>
<td>In rare instances when a vendor requires payment in advance, privileges may be lost if prior advances are not documented. Payment for rental or services by independent contractors cannot be made to third parties, only to the vendor who provided the service and require IRS Form W9 or adequate substitute.</td>
</tr>
<tr>
<td>The approval by college officials indicates only that the purpose of the fiscal commitment is in compliance with the provisions of the Trustees' policy governing student activity fees, and that the commitment does not constitute a fiscal obligation of the State of New York.</td>
</tr>
</tbody>
</table>

*IMPORTANT*

- [ ] HOLD CHECK FOR PICKUP
- [ ] MAIL CHECK TO VENDOR ADDRESS

REQUESTED BY:

GSA OFFICER/MDRF APPROVAL:

| COMPLETE DESCRIPTION OF PURCHASE |
| (WHAT? WHERE? WHEN? WHY?) |

**IF ALCOHOL WILL BE SERVED AT AN EVENT ON CAMPUSS, YOU MUST COMPLETE AN ALCOHOL REVIEW BOARD PERMIT REQUEST IN ADVANCE**

<table>
<thead>
<tr>
<th>WHAT/ EVENT:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>WHEN:</th>
</tr>
</thead>
</table>

| WHERE: |

*EVENTS CANNOT BE HELD AT A PRIVATE RESIDENCE*

<table>
<thead>
<tr>
<th>AMOUNT</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>TOTAL:</th>
</tr>
</thead>
</table>
Step 3: **Wait for Encumbrance Approval**

After you have submitted the encumbrance request form, the GSA Treasurer will approve it and send it to Campus Life for administrative approval. Upon approval, Sub-Board I, Inc. will generate a purchase order. The purchase order (PO) will be delivered back to GSA at which time you will receive an email notifying you that the encumbrance has been approved, who it was approved for, and the amount. The PO will be held in the GSA office until all the necessary paperwork has been submitted for reimbursement.

**Please note:**

1) **You must always submit the original, itemized receipt, invoice, and/or contract.** There will be no photocopies, faxes or generic, non-vendor-specific receipts accepted. It is your responsibility to obtain an adequate receipt, invoice or contract. Receipts that are not itemized are not acceptable. For example, the credit card slip that you sign at a restaurant is not an itemized receipt. You must submit the itemized cash register receipt along with the credit card slip. If the vendor does not give you an itemized receipt, you are responsible to ask for one.

2) **If you purchase anything with a credit card, you will also be asked to show proof that you are the person to be reimbursed.**
   You may submit a photocopy of your credit card with all except the last 4 digits blackened out so that your privacy will be maintained. If the credit receipt does not have your credit card number on it, then you must submit a credit card statement showing your name and listing the purchase.

3) **If you purchase with a check, you will need to submit a copy of the cancelled check.**

4) **You must always submit documentation from your club’s event.** The office of Student Life requires that all purchase orders include proof that the purchase is being made for a club event. Therefore, meeting minutes approving the expenditure (see “Sample Minutes” attached for required format), **AND** a flyer or poster that you hang for the event, a copy of the listserv e-mail sent to club members about the event, or any other reasonable proof of announcement of the event must be included before a check can be cut. You must do this for every purchase order. It is not the Office Managers’ responsibility to go back to previously paid purchase orders to find the documentation.

5) **You must always sign the receiving report after you have received the goods or services.**
**Purchase Order**

**Vendor:** 0000000164  
WEGMANS  
P.O. BOX 92217  
ROCHESTER, NY 14692-0217

**Ck. Dist:**  
MAIL CHECK TO VENDOR ADDRESS  

**Bill To:**  
GSA - ELECTRICAL ENGINEERING  
310 STUDENT UNION  
SUNY AT BUFFALO  
AMHERST, NY 14260  
Phone # (716) 645-2960

**Description:** FOOD AND DRINKS FOR CLUB ELECTION MEETING SEPT. 18, 2015 IN DAVIS HALL

<table>
<thead>
<tr>
<th>Qty</th>
<th>Unit</th>
<th>Detail/Account No.</th>
<th>Unit Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>003.1500.4724 (G.S.A. GENERAL FUND: ACADEMIC CLUBS: ELECTRICAL ENGINEERING)</td>
<td>100.00</td>
<td></td>
</tr>
</tbody>
</table>

Total: $100.00

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* OFFICE USE ONLY:  ( TIN Form Received: [ ] 1099 CODE: M R Alt EX )  ( 1099 FA PP AR ADV PY )

**RECEIVING REPORT:** (Check off EITHER Item 1 OR 2, whichever is applicable; sign and date below to certify receipt of goods or services)

1. PURCHASE OF GOODS: I certify that this order was received on __/__/____ OR
2. PURCHASE OF SERVICES: I certify that services have been rendered (Receiving Report not required for: pro-payers (maintenance agreements, insurance premiums, magazine subs or, etc); mileage reim; grants or co-sponsorships to outside parties)

RECEIVED BY __________ DATE __________

THE APPROVAL BY COLLEGE OFFICIALS INDICATES ONLY THAT THE PURPOSE OF THE FISCAL COMMITMENT IS IN COMPLIANCE WITH THE PROVISIONS OF THE TRUSTEES’ POLICY GOVERNING STUDENT ACTIVITY FEES, AND THAT THE COMMITMENT DOES NOT CONSTITUTE A FISCAL OBLIGATION OF THE STATE OF NY

Ordered By: SLFRANK  Req. Date: 09/14/2015  Req. No: 41923  Approved By/Date: KRS, LH 09/15/2015
SAMPLE
Minutes of
Club Name
Date

I. Call to order: The meeting was called to order by (Presiding Club Officer’s name) at 3:00pm.

II. Attendance: (List names of all members that were present)

III. Approval of Minutes – A motion was made by (Member’s name) to approve the minutes of the July 1, 2015 meeting. Motion seconded by (Member’s name). The motion passed 13-5-1 (in favor-opposed-abstained).

IV. Old Business:

[List any business that was left over from the previous meeting and any decisions or motions made to those items.]

V. New Business:

   Motion: (Member’s name) moves that we spend $(amount) for supplies for the party. Motion is seconded by (Member’s name).
   Vote: 8 in favor; 3 opposed; the motion carries.

2. A motion was made by (Member’s name) to encumber $(amount) for refreshments for the next GSA meeting scheduled for August 1, 2015. Motion was seconded by (Member’s name).
   Vote: 10 in favor; 1 opposed; the motion carries.

3. The club approved conference funding for the following students (amount for presenters and amount for attendees.)

   [List the names of students, the specific amount of funding approved, and the name and dates of the conference.]

   Vote: Unanimously in favor; the motion carries.

VI. Adjournment at 4:00pm.

Respectfully submitted,

(Officers signature)

(Print name)
GRADUATE STUDENT ASSOCIATION

Receiving Report

University at Buffalo The State University of New York
310 Student Union, Box 602100, Buffalo, NY 14260-2100
South Campus Satellite Office: 302 Abbott Hall (Tuesdays 9am 4pm)
(716) 645-2960, Fax: (716) 645-7333, www.gsa.buffalo.edu

Please complete Item 1 or 2, whichever is applicable.
Sign and date the form to certify receipt of goods or services.

1. Purchase of Goods

☐ The order was received in full on __________/_________/__________.
☐ The order was partially received on __________/_________/__________ *
  *Give details, e.g. back-ordered items, items returned, etc.

Attach vendor packing slip, if available.

2. Purchase of Services

☐ Services were rendered satisfactorily and in full.
☐ Services were rendered with the following exceptions noted:

☐ Services were not rendered when due.

Additional Comments:

SIGNED: ____________________________

DATE: ____________________________

The Receiving Report is **not** required for the following:
- Prepayments (e.g., maintenance agreements; service contracts;
  insurance premiums; magazine subscriptions; membership dues;
  etc)
- Mileage reimbursements
- Remittances of NYS Sales Tax on sales
- Refunds to accounts receivable customers
- Graduate research grants
- Graduate conference travel grants
- Grants, contributions or co-sponsorships to outside parties
Step 4: Is any additional paperwork necessary?

Depending on the situation, there are other forms that may be required to accompany your reimbursement paperwork. These may include a tax form, a general services contract, a co-sponsorship agreement, or a sponsorship agreement. Examples of each of these appear on the following pages.

1) **Tax forms** must be obtained from vendors who provide services or rentals. The IRS requires GSA to get tax identification numbers from such vendors before a check can be cut. Your club will be notified if a tax form is required. The GSA will email or fax tax forms to vendors who perform services or rentals, or one will be given to you to take to the vendor directly for completion. It is extremely important that you provide the complete, correct address for vendors. If the complete address is not provided then payment may be delayed.

2) **General services contracts** are required when GSA will be paying a vendor directly for a service or rental. This contract then serves as the invoice for the service to be provided. It will list what services are expected and what the price for these services will be. Examples of cases where a contract may be required include whenever an acceptable receipt or invoice cannot be provided by the vendor, when paying a band for playing at a party, paying a restaurant for catering an event, etc. If you are unsure whether or not a contract will be needed, please ask ahead of time!

3) **Speaker contracts** are required when your club will be paying an honorarium to a speaker from outside the University at Buffalo. University policy prevents any club from paying speakers that come from within the University.

4) **Co-sponsorship agreements** are required when your club is giving money to clubs from another student government, a department or other organization to help pay for an event. This form commits both parties to a predetermined, specific amount and serves as a contract between the two.

5) **Sponsorship agreements** are required when your club is receiving money from clubs from another student government, a department, or other organization as a contribution. This form commits both parties to a predetermined, specific amount and serves as a contract between the two. Monetary donations may be made to GSA clubs. The check must be made payable to the Graduate Student Association, not to your GSA club.

Charitable contributions from GSA clubs to outside vendors cannot be made from the allotted budget given to your club annually by the GSA. Clubs must prove (via Ticket Office reports or other types of receipts) that the money they wish to donate is not from student activity fees, but was raised independently.

The GSA treasurer (NOT your club treasurer) and the payee must sign any contracts and/or agreements before a check can be cut. These must have both original signatures. Scans, faxes and/or photocopies are not acceptable.
Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

1. Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2. Business name/disregarded entity name, if different from above

3. Check appropriate box for federal tax classification; check only one of the following seven boxes:
   - Individual/sole proprietor or single-member LLC
   - Partnership
   - Trust/estate
   - C Corporation
   - S Corporation
   - Limited liability company, Enter the tax classification (C= Corporation, S= Corporation, P=partnership)
   - Other (see instructions)

   Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.

4. Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
   - Exempt payee code (if any)
   - Exemption from FATCA reporting code (if any)

   (Applies to accounts maintained outside the U.S.)

5. Address (number, street, and apt. or suite no.)

6. City, state, and ZIP code

7. List account number(s) here (optional)

Requester’s name and address (optional)

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Part II. Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and

2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and

3. I am a U.S. citizen or other U.S. person (defined below); and

4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here: Signature of U.S. person

Date

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/w9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),

2. Certify that you are not subject to backup withholding, or

3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners’ share of effectively connected income, and

4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See What is FATCA reporting? on page 2 for further information.
GENERAL SERVICES CONTRACT

THIS AGREEMENT made and entered into this __________ day of __________, 20__ by and between the GRADUATE STUDENT ASSOCIATION of UB/__________________________________________ and ____________________________ for and in good and valuable consideration of the sum of $__________ to be paid to ____________________________ immediately following the satisfactory service herein described:

SERVICE: __________________________________________

PURPOSE OR NATURE OF CONTRACT: __________________________________________

DATE OF SERVICE: __________ / __________ / __________ TIME: __________

LOCATION OF SERVICE/PERFORMANCE: __________________________________________

NAME OF SERVICE PROVIDER:

____________________________________________________________________________________

(PLEASE PRINT)

(PERMANENT ADDRESS) (CITY) (STATE) (ZIP)

HOME PHONE: ______________ BUSINESS PHONE: ______________

It is understood that if for any reason GRADUATE STUDENT ASSOCIATION cancels or postpones said service, this agreement shall be deemed cancelled and terminated without further obligation or liability by either party. This agreement constitutes the whole agreement between the parties and any amendments thereto must be made in writing and executed by both parties. It is also stipulated that the person named below, who is signing this contract on behalf of him/herself, and/or the respective members of the performing act engaged by this contract is/are self-employed or employees of another employer. Therefore, this agreement does not constitute an employer/employee relationship between these two parties.

________________________________________
SIGNATURE OF PERSON/REPRESENTATIVE RECEIVING PAYMENT DATE
SOC. SEC. # OR FED. ID # ________________ (REQUIRED BY LAW)

DO NOT WRITE BELOW THIS LINE- OFFICE USE ONLY

________________________________________
GRADUATE STUDENT ASSOCIATION OFFICER DATE
LECTURER SERVICE AGREEMENT

PAY TO: _______________________________________  NAME  _______________________________________

HOME ADDRESS  (CHECK MUST BE SENT TO PAYEE’S HOME ADDRESS)

DESCRIPTION OF SERVICES PERFORMED

DATES OF SERVICE

1. HONORARIUM AMOUNT: $___________

2. ADDITIONAL EXPENSES (IF APPLICABLE- PLEASE NOTE IF THE FOLLOWING ITEMS ARE INCLUDED ON THE CONTRACT, THEY WILL BE CONSIDERED TAXABLE INCOME):
   a. Transportation: ($_____/mile x _______miles) $___________
   b. Lodging (Amount/Day_______x Days______) $___________
   c. Meals $___________
   d. Other (attach explanation) $___________

   TOTAL ADDITIONAL EXPENSES $___________

   TOTAL REIMBURSEMENT CLAIMED (HONORARIUM + ADDITIONAL EXPENSES) $___________

It is understood that if for any reason GRADUATE STUDENT ASSOCIATION cancels or postpones said event, this agreement shall be deemed cancelled and terminated without further obligation or liability by either party.

This agreement constitutes the whole agreement between the parties and any amendments thereto must be made in writing and executed by both parties. It is also stipulated that the person named below, who is signing this contract on behalf of him/herself, and/or the respective member(s) of the act engaged by this contract is/are self-employed or employees of another employer. Therefore, this agreement does not constitute an employer/employee relationship between these two parties.

_________________________________________  _______________________________________
SIGNATURE OF SPEAKER  DATE

DO NOT WRITE BELOW THIS LINE - OFFICE USE ONLY

_________________________________________  _______________________________________
GSA OFFICER  DATE
CO-SPONSORSHIP AGREEMENT

THIS AGREEMENT, made and entered into this ______________________ day of ____________________, 20______, by and between the Graduate Student Association and ______________________ for, and in good and valuable consideration of, the sum of $________________, to be paid to ________________________________, by check, under the terms and conditions as herein set forth:

1. GSA, the co-sponsorship grantor, is responsible only for the amount of this co-sponsorship grant. All other expenses, liabilities, and other obligations, either financial or legal, shall be incurred and satisfied by __________________________, the co-sponsorship grant recipient.

2. The grant provided by the GSA is to be restricted solely for the funding of __________________________.

3. GSA will fund the grant in the amount of $________________.

4. GSA will issue a check for the amount of the grant to the recipient upon receipt of this signed copy Agreement.

This agreement constitutes the entire agreement between the parties and any amendments thereto must be made in writing and executed by both parties.

IN WITNESS WHEREOF, we have unto set out hands and seals this ______ day of ___________ ______, 20______.

_________________________________________ By: ________________________________

_________________________________________ GSA OFFICER ___________________________________ DATE

DO NOT WRITE BELOW THIS LINE - OFFICE USE ONLY
SPONSORSHIP AGREEMENT

The undersigned parties namely, ____________________________, the sponsor, and the Graduate Student Association as recipient of a certain contribution from the sponsor agrees to the following terms as conditions of the sponsorship.

1. The ____________________________ will contribute funds in the amount of $_________ to be used towards ____________________________.

2. The recipient will issue to the sponsor, upon receipt of the contribution, a press-numbered receipt form as verification of receipt of the contribution.

3. Contributions or donations made to this student government are not tax-deductible to the sponsor as a charitable contribution.

IN WITNESS WHEREOF, we have unto set our hands this ___________ day of ________________, 20____.

_________________________________________  Title  _____________________________
Sponsor/Signatory

_________________________________________
Sponsor Address

DO NOT WRITE BELOW THIS LINE- OFFICE USE ONLY
Step 5: What to do once you are authorized

1) **Get a tax exemption form.** (see sample attached) Before you make a purchase that you want to be reimbursed for, please get a tax exemption form at Sub-Board I, Inc., 341 Student Union. You will need to have a requisition or PO number in order to request this document. You will not be reimbursed for NYS sales tax you pay for any purchases. You may also call Sub-Board at 645-2954 to have a tax exemption form mailed or faxed wherever you want it to go. An example of a tax exemption form is shown on the following page. Any kind of deposits are also not reimbursable. For example, bottle deposits paid for soda purchases cannot be reimbursed.

2) Make the purchase or proceed with the event.
   a) Complete all paperwork and keep copies for yourself
      (1) Get the original, itemized receipt, invoice or contract.
      (2) Get credit card receipts and proof of payment documentation, or the cancelled check
      (3) Attach event advertisement documentation and club minutes with receipts and return to GSA at 310 Student Union
      (4) Sign and date the receiving report on the PO, or include a signed Receiving Report. These can be downloaded from the GSA website www.gsa.buffalo.edu.

**PLEASE ask questions before you make a purchase if you are unsure about anything!**

What to do if you are denied:
Make an appointment with the GSA Treasurer. Bring any additional information requested by the Treasurer. If your encumbrance request has been rejected, you may not use your club funds to purchase items and you will not be reimbursed for any purchases you make.
EXEMPT ORGANIZATION CERTIFICATION

VENDOR

Sample

NAME
And
ADDRESS

SUB-BOARD I, INC.
341 STUDENT UNION
SUNYAB
AMHIERST, NEW YORK 14260

CERTIFICATE NUMBER (from ST-119)

THIS CERTIFICATION IS ACCEPTABLE IF THE PURCHASER HAS ENTERED ALL INFORMATION REQUIRED.

I CERTIFY THAT THE ORGANIZATION NAMED ABOVE HAS RECEIVED AN EXEMPT ORGANIZATION CERTIFICATE WITH THE ABOVE NUMBER, AND IS EXEMPT FROM STATE AND LOCAL SALES TAXES ON ALL ITS PURCHASES.

SIGNATURE OF OFFICER OF ORGANIZATION
TITLE
DATE PREPARED

[SBI] [DENTAL] [GMA] [GSA] [MFCSA] [MSP] [SA] [SBA]

Exempt Organization Certifications (ST-119.1) may be used only when an exempt organization is the direct purchaser and payer of record. Any bill, invoice or receipt given by the vendor must show the above organization as the purchaser. Payment must be from the funds of the exempt organization.

The exemption from state and local sales and use tax does not extend to officers, members or employees of the organization. Personal purchases made by such individuals are subject to sales tax. An Organization's exemption does not extend to its subordinate or affiliated units. When making purchases, subordinate units may not use the exemption number assigned to the parent organization. Such misuse may result in the revocation of the exemption granted.

An Exempt Organization Certification must be given to each vendor at the time of the purchase from that vendor. A separate certification is not necessary for each subsequent purchase provided the exempt organization's name, address, and certificate number appear on the sales slip or billing invoice. The certification is considered part of each order given to the vendor and remains in force unless revoked.

Vendors must retain the Exempt Organization Certification for at least three years after the date of the last exempt sale substantiated by the certification.

Additional copies of this form (ST-119.1) can be obtained from any State District Tax Office or from the main office of the Taxpayer Assistance Bureau, State Campus, Albany, New York 12227. This form may be reproduced without prior permission from the Department of Taxation and Finance.
How to make a deposit:

1) Deposits from events/fundraisers/sales
   a) All money collection is handled through the Sub-Board I, Inc. Ticket Office. Please refer to the following pages for specific Ticket Office policies and procedures. *Any time your club collects money, you MUST use the Ticket Office.* You must contact the Ticket Office at least 10 business days before the anticipated event/fundraiser/sale is to happen. If arrangements are not made 10 days before, the Ticket Office will penalize your club. Ticket Office personnel will set up the event for you, print tickets, sell merchandise, etc. The Ticket Offices are located at 221 Student Union (645-2353) on North Campus and at 350 Harriman Hall (829-2581) on South Campus. After the money has been collected through the Ticket Office it will be deposited at Sub-Board and a budget adjustment will be done to increase your club’s expense budget.
Policies, Rules, and Regulations for

Student Government(s) and Student Organization(s)

The SBI Ticket Office is your third party, revenue control agent. We serve to safeguard your organization from potential theft and errors in collection. We also provide your organization with the necessary accounting trails required by auditors in their review of the Mandatory Student Activity Fee usage.

I. The SBI Policy: The SBI Ticket Office shall serve as the Revenue Control service for ticket and merchandise sales for your organization.

II. All Ticketing and Merchandise Sales must be set-up with the SBI Ticket Office prior to the completion of the sale. Failure to do so will result in an Administrative Fine.
   a. This includes all sales such as:
      i. Merchandise Sales including but not limited to:
         1. Hats
         2. T-shirts
         3. Sweatshirts
         4. Mugs
         5. Banners
         6. Other tangible objects
      ii. Ticketed/Ticketing/Ticket Sales (any event) including but not limited to:
         1. Parties
         2. Dinners
         3. Movie Nights
         4. Auctions
         5. Conferences
         6. Tournaments
         7. Raffles of any kind
      iii. Exceptions to this policy are to be approved by the Ticket Office Management Team.
         1. Any and all funds collected from these exempted events must be deposited through your student government.

III. GENERAL PROCEDURES FOR ALL MERCHANDISE AND TICKET SALES EVENTS:
   a. Pick-up an SBI Ticket Office Event Data Form at:
i. Your student government
ii. Sub-Board I
iii. The SBI Ticket Office
iv. www.subboard.com/tickets

b. Complete the form
c. Have the form reviewed and signed by the approved individual(s) of your STUDENT GOVERNMENT
d. Schedule an Appointment with a member of the SBI Ticket Office Management Team by calling our office at 645-2353 or visiting our office(s) at 350 Harriman Hall, or 221 Student Union
   i. YOU (organization representative) MUST ATTEND ALL APPOINTMENTS IN PERSON
   ii. All appointments must be setup 24 hours in advance
   iii. Walk up appointments are available at the discretion of the Ticket Office management Team
   iv. Appointments are scheduled between 10am-4 pm, Monday through Friday
   v. Appointments may be held at any location on a UB Campus
e. Bring the completed SBI Ticket Office Event Data Form to your SBI Ticket Office Event Appointment
f. At the SBI Ticket Office Event Appointment, you will receive additional guidelines specific to your sale.
g. At the SBI Ticket Office Event Appointment you will set a closing date. On, or before, that closing date:
   i. All final deposits and unsold merchandise must also be brought for recounting
   ii. You must sign a closing agreement
h. The Ticket Office WILL NOT accept any deliveries from vendors.

IV. PROVISIONS FOR ALL SALES:
   a. May be sold:
      i. In the Box Office
         1. Sales will be conducted at all Box Office Locations
            a. 221 Student Union
            b. 350 Harriman Hall
            c. Hours vary for each location
         2. Payment Options
            a. Cash
            b. Check
            c. Money Order
            d. Credit/Debit Cards with Visa, MasterCard, Discover
      ii. On-Site
         1. Having tickets sold at the door the day of your event.
         2. The Ticket Office will supply an SBI Ticket Office Cashier for On-Site Sales
3. If the SBI Ticket Office is not notified of an On-Site sale at least 10 business days prior to the Event Date:
   a. The SBI Ticket Office may not be able to secure a Cashier.
   b. If a cashier cannot be secured due to a lack of notice, then the organization may:
      i. Let customers in free of charge
      ii. Admit only those who have purchased a ticket prior to the start of the event
      iii. Deny entry to those whom have not already purchased tickets
      iv. NOT charge customers
4. All organization are subject to the On-Site Ticketing Regulations
5. Payment Options
   a. Cash
   b. Check
   c. Money Order
   iii. Online
      1. This allows your organization to sell tickets over the internet
      2. NOT ALL EVENTS AND/OR MERCHANDISE SALES CAN BE SOLD ONLINE
      3. Ticket will be mailed, at the request of the customer, by the Ticket Office or SBI.
      4. Merchandise WILL NOT BE MAILED BY THE SBI TICKET OFFICE OR SBI.
      5. The online design of your organization’s ticket may be different from the Box Office design, this is for operational reasons.
      6. Your event will appear on our website online at the start of the sale
      7. Online sales will be closed:
         a. At the request of the organization representative that set-up the event
         b. At the request of the Student Government Executive Officers in which the organization is a member/recognized
         c. At least 3 hours before the event on a business day that the Ticket Office is open
         d. At 5pm on the last business day prior to the event, should the event occur on a non-business day
8. Payment Options
   a. Credit card
   b. All changes to sales must be provided in writing, and approved by the student government
   c. Refunds shall be conducted by the organization NOT the SBI Ticket Office or SBI
V. The On-Site Ticketing Regulations are as follow:
a. Organizations will meet the Ticket Office agent at the event site at the scheduled time, and will maintain contact with the Ticket Office agent throughout the sales period of the event.
b. The Ticket Office agent is not responsible for:
   i. Maintaining control
   ii. Ripping tickets,
   iii. Giving out/putting on wrist bands,
   iv. Stamping hands,
   v. Monitoring the door,
   vi. Selling merchandise which has not been properly set-up with the Ticket Office.
c. A club representative will be present for the duration of the event/sale to:
   i. Collect tickets,
   ii. Maintain control,
   iii. Monitor the admittance of patrons
d. Organizations cannot change ticket prices or any other event information at the event. As per the Event Data Form, any changes must be submitted in writing prior to the date of the event.
e. If there is a Complimentary Ticket List for the event, it will be clearly written or typed and given to Ticket Office Management Team prior to the event.
f. The ticket stock, as well as any cash collected, is the property of the Ticket Office and will be held in trust for the organization.
g. Should any person(s) from the organization or outside of the organization attempt to take money, tickets, or any property held in trust from the cashier, The Ticket Office will seek legal action.
h. If any event is cancelled, organizations must notify the SBI Ticket Office two business days prior to the event.
i. The SBI Ticket Office will be in compliance with SBI, University and SUNY Trustees policies; in addition to Federal, State, and Local Laws. Should a violation in any policy/law occur causing the closing/cancellation of an event/sale, the Ticket Office will hold all funds acquired until further notice.
j. At the completion of the event, a club member will escort the Ticket Office agent to their vehicle/method of transportation.

VI. ADDITIONAL PROVISIONS FOR MERCHANDISE ONLY:

a. Consignment Sales
   i. You (the individual, not the organization) must sign an agreement for personal liability of the dollar value of the items to be sold.
   ii. Payment options
      1. Cash
      2. Check
      3. Money Order
b. When YOU receive the merchandise from the vendor
   i. Make an appointment with the SBI Ticket Office.
ii. The Ticket Office will not accept direct deliveries from your vendors.

iii. Bring Merchandise

iv. Bring vendor invoice/packing slip

v. Merchandise will be counted against the vendor invoice/packing slip
   1. Organization Representative must be present for count
   2. Organization representative has a right to count merchandise, before and after the Ticket Office preforms its count, in the presence of the Ticket Office Management Team

vi. Ticket Office shall return all merchandise to the organization at the completion of the count

vii. Merchandise may be given to the Ticket Office for sale, provided the sale has been set-up with the Ticket Office as a Box Office Sale

c. Sale period may not exceed a period of 6 months.
   i. This time limit exists because you are allowed the privilege of not charging sales tax.

d. All sales must be documented with receipts by the conclusion of the sale period.

e. All merchandise that has not been sold may be, with the approval of your government:
   i. Given away
   ii. Destroyed
   iii. Resold

f. If merchandise is resold, the sales dates can start no earlier than 60 business days after the closing date of the previous sale

VII. OPTIONS FOR SELLING MERCHANDISE.
   a. Pre-Sale - Collect the funds PRIOR to receiving the merchandise.
   b. Post Sale – Collect the funds AFTER receiving the merchandise.

VIII. Additional Provisions for Pre-Sale Merchandise Sale:
   a. Pick up a Receipt book at the SBI Ticket Office during appointment.
   b. Collect the money for the merchandise and give each customer a completed receipt.
   c. At the conclusion of the sale:
      i. Make another appointment with the SBI Ticket Office.
      ii. Deposit all remaining funds collected
      iii. Sign Closing Agreement

d. Distribute Merchandise
   i. Ticket Office will only distribute merchandise at the point of sale

IX. Additional Provisions for Post-Sale Merchandise Sale:
   a. Merchandise shall serve as receipts
   b. Make an appointment with the SBI Ticket Office to close out the consignment, if one is open.
      i. Bring any unsold merchandise.
      ii. Merchandise will be recounted
      iii. Merchandise will be return to the organization after the recount

c. Sign Closing Agreement
X. All funds will be deposited into your revenue account after the Signing of the Closing Agreement.

XI. PROCEDURES FOR TICKET SALES ONLY
   a. The SBI Ticket Office provides the ticket stock.
   b. Tickets are provided to your organization for:
      i. Admission
      ii. Admittance
      iii. Attendance
      iv. Raffles
   c. All tickets must have printed on the face:
      i. The Event Name
      ii. Event Date
      iii. Event Location
      iv. Price
      v. Fees
   d. Each ticket is a receipt and no further documentation is required.

XII. Vendor Fair/Paid Tabling Policy
   a. Table rentals are run through the Ticket Office.
   b. Shall be sold as a ticketed event
   c. Student Organizations will provide the Ticket Office with a list of all the organizations who were invited/asked/propositioned to attend.
   d. Vendors will purchase, in advance, a table for the event.
      i. If the vendor needs to be invoiced:
      ii. Student Organization must obtain a Table Agreement form.
      iii. Student Organization shall have the Vendor complete the form and return it to the Ticket Office prior to the event.
      iv. The Ticket Office will keep a copy of the form, the original will be sent to the Student Government office.
      v. The Student Government will prepare a control sheet and send it to the SBI Corporate Office.
      vi. The Ticket Office will maintain a list of the vendors who have paid and/or have submitted their Table Agreement Form, for the event.
      vii. Day of the event:
         1. A representative from the Ticket Office will go to the venue and verify the vendors who are attending.
         2. If a vendor comes to the event and has not completed a Table Agreement Form and/or has not paid, they will be required to complete the Table Agreement Form and/or pay.
         3. The list of vendors will then be sent to the Student Government.
         4. The Student government will be notified of any vendors who has not paid in advance for their table and/or who has not signed Table Agreement form.
5. The Student Government and Sbi Ticket Office may take disciplinary action against the Student Organization, if any vendors fail to pay for their table rental, collectively and/or separately.

XIII. Executive Officers, or their appointees, of a Student Government have the authority to:
   a. Set-up events on behalf of an organizations under their jurisdiction
   b. Place any event on hold, which has been set-up by any of the organizations under their jurisdiction
   c. Cancel any event, which has been set-up by any of the organizations under their jurisdiction
   d. Make adjustments, in writing, to any event, which has been set-up by any of the organizations under their jurisdiction

XIV. Executive Committee of SBI may:
   a. Place any event on hold
   b. Cancel any sales for an event
   c. Make changes to these policies, rules, and/or regulations

XV. Fines and Fees
   a. All organizations are subject to any and all fines and fees.
   b. An organization may be assessed one (1) or more fines or fees per event/sale.
   c. Fines or fees may only be waived by a member of the SBI Ticket Office Management Team
   d. All fines shall be deducted from the revenue collected from the sale in which the fine was assessed.
   e. Should the fines exceed the revenue, the organization shall be held responsible for payment of the remaining balance.
   f. Multiple Organizations may be fined for a single violation committed by any of the event organizers or their representatives.
   g. Appeals to any and all fines:
      i. Must be made in writing and submitted to the SBI Ticket Office Management Team.
      ii. Shall be reviewed by the Management Team
      iii. Shall host a hearing to listen to all parties arguments.
      iv. Shall be ruled upon no later than ten (10) business days after all documents have been received and all hearings have concluded.
      v. All rulings may be appealed to the Executive Committee.
      vi. The Executive Committee shall set its own guidelines for reviewing the rulings of the SBI Ticket Office Management Team
   h. Late Fine:
      i. Shall be imposed on those organizations that meet any of the following:
         1. Set-up a Ticketed Event less than ten (10) Business Days prior to their on-sale date.
         2. Make further deposits for a Ticketed Event beyond the signing of the Closing Agreement.
3. Set-up Merchandise Sale less than five (5) Business Days prior to their on-sale date, where the Ticket Office Staff sells the merchandise (or its equivalent) on behalf of the organization.

4. Make further deposits for a Merchandise Sale beyond the signing of the Closing Agreement.
   
   ii. All Merchandise Sales which are Consignment ONLY Sales are exempt from late fines.

   iii. All Merchandise Sales which are Uniforms are exempt from late fines.
      1. Uniforms are those articles of clothing or equipment mandated, by the collegiate league that the organization in question is a registered member, for use during competition.

   i. Late Fine Schedule
      
      i. Ticket Sales
         1. Late Set-up Fine - $20 for each business day under ten (10) business days from the on-sale date. Shall not exceed $200
         2. Late Closing Fine – 10% of each deposit made after the signing of the Closing Agreement, shall have no limit.

      ii. Merchandise Sales
         1. Set-Up Late Fine - $20 for each business day under five (5) business days from the on-sale date. Shall not exceed $100
         2. Closing Late Fine – 10% of each deposit made after the signing of the Closing Agreement. Shall have no limit

   j. Administrative Fines – Shall be imposed on those organizations that violate any and/or all of these rules and regulation except where another fine has been assessed.
      
      i. The fine shall be $75 for each violation.

   k. Ticket Fee – Shall be imposed on all ticketed events.
      
      i. 10% of the face value of the ticket up to, but not exceeding, $10.00
         1. Fee shall be added to your ticket face value

   l. Reprint Ticket Stock Fine – Shall be imposed on an organization that request a reprint of tickets for any event due organization error, or changes within their control
      
      i. Shall be waived if conditions which mandate a reprint are outside of the control of the organization and/or student government
      
      ii. The fine shall be $0.50 Per Ticket

   m. Convenience Fee
      
      i. Rate(s) set by SBI
      ii. To be paid by online customers
      iii. May be paid by organizations, with a signed contract

   n. Mailing Fee
      
      i. Rate(s) set by SBI
      ii. Incurred by customer if (s)he wishes to have their tickets and only tickets mailed.
      iii. May be paid by organizations, with a signed contract
XVI. Definitions

a. Box Office – the Physical location(s) of the Ticket Office
b. Business Day – a day that the SBI Ticket Office is open for general sales
c. Consignment – to give, transfer, or deliver into the hands or control of the organization or their agent.
d. Deposit – the turning over of funds
e. Event – an activity held by an organization
f. Event Close – when all paperwork has been signed by an organization to inform and verify that the sales of an event have been completed.
g. Event Set-up - when all paperwork needed by the ticket office is completed and submitted to a member of the management team.
h. Executive Committee – the collection of the elected Executive Officers of SBI
i. Fee – costs incurred by organization and/or customer
j. Fines – costs assessed on an event or sale due to policy and/or procedure violations
k. Merchandise – a tangible good or its equivalency.
l. Merchandise Sale – An activity in which a tangible good or its equivalency is sold.
m. On-Site – the physical location or the sale occurring at the physical location of the event
n. Online – the World Wide Web or internet
o. Organization – a permanently, temporary, or otherwise recognized student group which falls under the jurisdiction of one of the University at Buffalo’s recognized Student Governments.
p. Sale – the process of exchanging goods and/or services for financial gains.
q. SBI - Sub-Board I, Inc.
r. Ticket – an object used for regulation of admission, admittance, attendance, registration, or raffle.
s. Ticket Office Management Team – Any Director, Assistant Director, Manager, or Assistant Manager, whom is an employee of SBI, whose duties it is to oversee the operation(s) of the SBI Ticket Office.
t. Ticketed/Ticketing/Ticket Event – A function or activity which utilizes tickets or it equivalency as the method of regulation for admission, admittance, attendance, or registration.
u. Violation(s) – Failure to adhere to the rules as outlined
Ticket Event Data Form
For Student Government/Organizations

Club/Organization Name: ________________________________

Student Government: ASDA GMA GSA MSP SA SBA SPSA SBI

Event Name: ____________________________

Event Date: / / Start Time: __________ Event Close Date: / /

Revenue Account Line #: ______-_______-_______-_______
(Account where your funds will be deposited after the event is closed)

Patron Type | Quantity | Face Value | Fee | Box Office? | On-Site? | Online?
--- | --- | --- | --- | --- | --- | ---
1) | $ | $ | |
2) | $ | $ |
3) | $ | $ |
4) | $ | $ |
5) | $ | $ |
6) | $ | $ |

Total Capacity for Event: ________________________

I. ID Verification \(\quad\) (Ticket Office sales only)

YES □ NO □

II. Ticket Office Advertisement

Marquee □
(event name only)

Display Case □
(include flyer)

III. Sale Dates

First Sale Date / / Last Sale Date / /

IV. Venue

Location: ____________________________

Address: ____________________________

V. On-Site

Sell Times: ______ to ______

Dress (Circle one) Formal or Casual

Do you have a P.O. for this event? YES NO PO#

Have you done a Risk Assessment? YES NO See Student Government for more details

Does event require Extra Insurances? YES NO See Student Government for more details

Have you reserved all rooms/equipment/production/etc.? YES NO See Student Government for more details

Ticket Fees Ticket Surcharge: 10% of Face Value; Max value $10, Internet Ticket Surcharge: $1.00/ticket

Miscellaneous Information:

Club Rep (Print Name): ____________________________

Club Rep Signature: ____________________________

Phone (____) - _______ Alt. Phone (____) - _______ E-Mail: ____________________________

Government Officer Signatures: 1) ____________________________ 2) ____________________________

SA ONLY: Finance Dept. Review Initials:

By signing this form, all parties agree to adhere to the information supplied therein and the guidelines for student organizations and the regulation for on-site ticketing as approved by Sub-Board I Inc. The club representative whose signature is affixed to this document must furnish changes to any of the supplied information in writing. The SBI Ticket Office reserves the right to charge a convenience fee for any online servicing.

For SBI Ticket Office Use Only:

Event Set Up Date: ________ Management Initials: ________ Fines: ____________________________
Merchandise Event Data Form
Student Government/Organizations

Club/Organization Name: ____________________________  Student Government: ASDA GMA GSA MSP SA SBA SPSA SBI
No Abbreviations  Circle One

Event Name: ____________________________  Start Date: __/__/   End Date: __/__/  Revenue Account Line #: ____________________________
(Account where your funds will be deposited after the event is closed)

Event Name: ____________________________  Start Date: __/__/   End Date: __/__/  Revenue Account Line #: ____________________________
(Account where your funds will be deposited after the event is closed)

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(Will this/these patron type/s be sold in…. Y or N?)

I. Selling Method (Check one)
   Pre-Sale (before goods are received) □   Post-Sale (after goods are received) □

II. Merchandise Necessity
   a. Is/Are this/these item(s) mandated for competition?    YES  NO
   b. Is/Are this/these item(s) mandated for academic purposes?    YES  NO
   c. Are/Is this/these item(s) mandated for the existence of your organization?  YES  NO

If you have answered yes to any of the above questions, please provide written proof of the mandate, and the relation of your organization to the mandating organization.

Club Rep (Print Name): ____________________________  Club Rep Signature: ____________________________
Home Phone: (____) _____-______  Office Phone: (____) _____-______  E-Mail: ____________________________

Government Officer Signatures: 1) ____________________________  2) ____________________________
SA ONLY: Finance Dept. Review Initials: __________

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Miscellaneous Information:

For SBI Ticket Office Use Only:
Management Initials: __________  Event Set up Date: __________  Fines: ____________________________
Raffle Event Data Form
For Student Government/Organizations

Club/Organization Name: ____________________________
Student Government: ASDA GMA GSA MSP SA SBA SPSA SBI
Event Name: ____________________________
Start Date: / /  End/Pull Date: / /  Total Winners:______
Revenue Account Line #: ______-_________-(Account where your funds will be deposited after the event is closed)

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I. Pull Venue Location: ____________________________  Address: ____________________________
Pull Time: ___:___ AM PM

II. Ticket Office Advertisement
   □ Marquee  □ Display Case
   (event name only) (Org. Must Provide Flyer, Min 4¼"x5½" to Max size 11"x17")

Describe Raffle: ____________________________________________
   ____________________________________________
   ____________________________________________

III. Sale Dates
   First Sale Date: ____/____/_____
   Last Sale Date: ____/____/_____

Ticket Fees Ticket Surcharge: 10% of Face Value; Max value $10, ★★★

Miscellaneous Information:
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

Club Rep (Print Name): ____________________________  Club Rep Signature: ____________________________
Phone (___)_________ Alt. Phone (___)_________ E-Mail: ____________________________

Government Officer Signatures: 1) ____________________________  2) ____________________________

SA ONLY: Finance Dept. Review Initials: ____________________________

By signing this form, all parties agree to adhere to the information supplied therein and the guidelines for student organizations and the regulation for on-site ticketing as approved by Sub-Board I Inc. The club representative whose signature is affixed to this document must furnish changes to any of the supplied information in writing. The SBI Ticket Office reserves the right to charge a convenience fee for any online servicing.

For SBI Ticket Office Use Only:
Event Set Up Date: ________ Management Initials: ________ Fines: ____________________________
I, ____________________, the ____________________, of ____________________, on _______________ do here by notify the SBI Ticket Office that all sales for the event _________________________________, are complete and I request all revenues be transferred to our revenue account. Should I, or any other person claiming to be an officer or representative of my organization, deposit any funds for said event; we will be subject to a fine. I acknowledge that we have completed all necessary merchandise and/or ticket counting as required by the SBI Ticket Office. Should any additional counting be required we acknowledge we shall be subject to a fine.

___________________________________  ____________________________________
Organization Representative Print  Organization Representative Signature

___________________________________  ____________________________________
Phone  Date

___________________________________
Email

Closing Request