

PRF-PU DISCRETIOANRY NEW ACCOUNT OR CHANGE PROCESS

- **A memo needs to be written requesting a new PRF-PU Discretionary account to be created, and, or changed. Indicate the reason for the request and have the memo approved by authorized signer. The approver must be listed on the Discretionary Signature Authorization Form that is currently on file at the Purdue Research Foundation.**
- **Once the memo is complete the request needs to be approved by your DFA.**
- **Once the DFA has approved the memo it will need to be sent to Purdue Central Master Data CMDT@purdue.edu for review and approval.**
- **CMDT will forward to Tammy Metzinger, PRF Controller, for approval.**
- **Tammy will establish a new discretionary account or make the requested change.**
- **When the account has been created or change completed your department will be notified.**

Questions may be directed to PRFAP-Discretionary@prf.org