



To Whom It May Concern:

In order to transfer a mutual fund to the University of Kentucky a shell account will need to be set up at the fund company where your shares are held. Our custodian bank, Northern Trust, will complete this process on behalf of the university.

To facilitate this process, please complete the mutual fund transfer information below and send by mail, fax or e-mail to:

UK Office of Philanthropy
ATTN: Jamie Risen Associate Director of Gift Receiving
100 William B. Sturgill Building, Lexington, KY 40506-0015
Fax#: (859) 323-9881
E-mail address: jamie.risen@uky.edu

If you have any questions or need additional information, please contact Jamie Risen by phone at (859) 257-4761, or toll-free at (800) 875-6272.

Sincerely,

UK Office of Philanthropy

Today's Date: _____

Mutual Fund Name: _____

Symbol: _____

CUSIP #: _____

Number of Shares or \$\$ Amount: _____

Name of Shareholder: _____

Contact Person: _____

Contact Phone #: _____

Contact E-mail Address: _____

Donor Name(s): _____

Gift Designation: _____