



To Whom It May Concern:

In order to gift mutual fund shares to the University of Kentucky through a re-registration process with your shareholder we will need to be set up a temporary account with them to receive your gift. 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 Philanthropy  
ATTN: Gretchen Bower, Associate Director of Gift Receiving  
2353 Alexandria Drive Suite 100, Lexington, KY 40504 Fax#:  
(859) 323-9881  
E-mail address: glbowe0@uky.edu

If you have any questions or need additional information, please contact Gretchen Bower by phone at (859) 562-2583, or toll-free at (800) 875-6272.

Sincerely,

UK Philanthropy

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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: \_\_\_\_\_

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