



GIFTS OF SECURITIES

***Support the University of Rhode Island
Give More Than You Thought Possible***

Why Consider a Gift of Securities to URI?

If your investments have appreciated over time, you may be able to give much more than you thought possible by transferring appreciated securities (stocks, bonds, and mutual fund shares) rather than cash. Your gift will be credited at the average market value as of the date of transfer. You could possibly avoid the potential capital gains tax on the appreciation, provided you have owned the investment for more than one year. URI benefits from the full amount of your gift.

How To Make a Gift of Securities to the URI Foundation

Simply instruct your broker or investment manager to transfer the securities to the University of Rhode Island Foundation Account at Merrill Lynch, Providence office:

D.T.C. #5198

For: Merrill Lynch Account #867-04159 Attention: Greg Voigt (401-863-8762)

To ensure that the transaction is properly executed and credited to you, please complete the form below and return it to us. If you hold the securities in certificate form, or have any questions, please contact the URI Foundation. We will send you a letter acknowledging the securities transferred and will credit the gift to you at the average market value as of the date of transfer. Thank you.

Questions?

Rebecca Mara
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URI Foundation
401-874-9334
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Merelise Hitte
Director of Finance
URI Foundation
401-874-4490
mhitte@foundation.uri.edu

Please return the form below to:

URI Foundation
Attn: Finance Department
79 Upper College Road
Kingston, RI 02881
Fax: 401-874-5524



My broker/brokerage firm is _____

I intend to transfer _____ shares of _____ on _____

CUSIP or Ticker _____

The estimated value of my gift is _____

My gift is to be used for _____

Name _____

Address _____

Daytime telephone _____ Email Address _____