

## MAKE A GIFT OF SECURITIES TO SUPPORT URI

### 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: Tom Curry (401) 863-8755**

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.

### Questions? Contact the URI Foundation:

*Rebecca Vigeant, Gift Processor, 401.874.4786 or rcreighton@uri.edu.*

*Sandra Pendlebury, Data Management Manager, 401.874.4533 or sandyp@uri.edu.*

*Return the form, below, to: URI Foundation, Gift Processing, 73 Upper College Road, Kingston, RI 02881.*

*Fax #: 401.874.5847*



My broker/brokerage firm is: \_\_\_\_\_

I intend to transfer \_\_\_\_\_ shares of \_\_\_\_\_ on \_\_\_\_\_

CUSIP or Ticker \_\_\_\_\_

Estimated value of my gift: \_\_\_\_\_

My gift is to be used to support: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Daytime telephone: \_\_\_\_\_ Email Address: \_\_\_\_\_

**Thank You for Supporting URI!**