



UNIVERSITY OF OREGON  
FOUNDATION

## Stock Gift Notification

Before making a gift of securities, please complete and submit this form to the Compliance Department or call 541.302.0288. When we have received this information, we can provide specific instructions for transferring securities to ensure a smooth and complete process.

### 1. Donor Information:

- a. Donor name(s) \_\_\_\_\_
- b. Donor address \_\_\_\_\_
- c. Phone # \_\_\_\_\_
- d. Email \_\_\_\_\_

### 2. Gift Information:

- a. Gift Type  Outright Gift  Deferred Gift (e.g., trust, gift annuity)
- b. Security Type  Publicly-Traded Stock (please indicate how security is held)
  - at a brokerage, \_\_\_\_\_
  - in physical certificate form Mutual Funds (please indicate where security is held)
  - at a brokerage, \_\_\_\_\_
  - directly with the fund company, \_\_\_\_\_
  - not sure/please help

Fund Name \_\_\_\_\_

 Bonds
- Closely-Held Stock
- c. Est. \$ Amount \$ \_\_\_\_\_

### 3. Preferred Method of Contact:

- a.  Please **contact donor(s) directly** with transfer instructions:  
Best way is by (choose one)  Phone  Email
- b.  Please **contact donor(s) broker/agent** with transfer instructions:  
Broker/agent is: Name \_\_\_\_\_  
Company \_\_\_\_\_  
Phone # \_\_\_\_\_  
Email \_\_\_\_\_

### 4. UO Development or Program Contact:

- a. Name \_\_\_\_\_
- b. Program \_\_\_\_\_
- c. Phone # \_\_\_\_\_