

Sample Letter Requesting a Stock Transfer

Date

Name

Address

City, State

Dear Sir or Madam,

Please accept this letter as my request to make a gift of stock on [insert date] to the University of Colorado Foundation for the benefit of the University of Colorado. I would like to transfer [number] shares of [company name] to the University of Colorado Foundation [indicate month, and year when you would like the transfer to occur].

It is important to contact Karen Kay Thompson at the University of Colorado Foundation, Gift Planning Group, as she will advise you on the appropriate procedures to complete this transaction. She can be reached at 303 541-1335. The University of Colorado Foundation will also provide me with a receipt for this gift that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or supporting organization.

I would like my gift to be used as follows:

Thank you for your prompt attention to this matter.

Sincerely,

cc: University of Colorado Foundation
Gift Planning Group
4740 Walnut Street
Boulder, CO 80301