

Sample Letter Requesting a Stock Transfer

Date

Name
Address
City, State

Dear Sir or Madam,

Please transfer [number] shares of [company name] to the University of Colorado Foundation [indicate month, and year when you would like the transfer to occur].

Contact Karen Kay Thompson at the University of Colorado Foundation, Gift Planning Group, to inform the foundation of the impending gift. She can be reached at 303 541-1335 or toll free at 800 405-9488.

The following information provides instructions for an electronic transfer:

Foundation Broker: Paul G. Arevian, CFA
First Vice President – Investments
UBS Financial Services Inc.
370 17th Street, Suite 4100
Denver, CO 80202-5641
Email: paul.arevian@ubs.com
Voice: 303-820-5015
Fax: 303-820-5026

DTC transfer instructions:

Brokerage Firm:	UBS Financial Services, Inc.
DTC Number:	0221
For Credit To:	University of Colorado Foundation
Taxpayer ID #:	84-6049811
Account Number:	AB-06753-15

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