

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. 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 URI Foundation & Alumni Engagement

To ensure that the transaction is properly executed and credited, please complete the form, below. Return it to us and please inform your broker to contact URIFAE gift processing (contact information listed below) directly, prior to making a transfer to URIFAE's Merrill Lynch account. Our Merrill Lynch account information is as follows:

D.T.C. #8862 For Merrill Lynch Account # 850-03270

Attention: Josh Frankel 212.382.8482

The form must be completed and returned to us each time you make a gift of securities. If you hold the securities in certificate form, or have any questions, contact URI Foundation & Alumni Engagement to ensure the most efficient transfer possible.

Thank you for your gift of securities supporting URI. We will send you a letter acknowledging the securities transferred and will credit the gift to you at the average market value on the date of transfer. Please allow additional time for the processing of this type of gift.

Questions? Contact URI Foundation & Alumni Engagement:

Rebecca Vigeant, Gift Processing Manager, 401.874.4786 or rvigeant@uri.edu.

Return the form, below, to: URI Foundation & Alumni Engagement, Gift Processing, P.O. Box 1700, Kingston, RI 02881. Fax #: 401.874.5847



SECURITIES TRANSFER FORM

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 (PLEASE PRINT): _____

ADDRESS: _____

CITY / STATE / ZIP: _____

DAYTIME TELEPHONE: _____ EMAIL: _____