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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 mean market value as of the date of transfer, and you can take a tax deduction for that full amount. You avoid the potential capital gains tax on the appreciation, provided you have owned the investment for more than one year, and URI benefits from the full amount of your gift.

How to make a Gift of Securities to the URI Foundation: Simply request that your broker or investment manager contact our agent, U.S. Trust, Bank of America Private Wealth Management, for delivering instructions.

■ **Nancy Infante**
Philanthropic Administrator II
1.860.244.4868

We will send you a letter acknowledging that the securities transferred, and will credit the gift to you at the mean market value as of the date of transfer. The securities will be sold from the URI Foundation's account and the net proceeds remitted to the Foundation for the purposes you designate. To ensure that the transaction is properly executed and credited to you, we also request that you complete the form below and return it to us. If you hold the securities in certificate form, or have any questions, please contact us for assistance. Thank you.

■ **URI Foundation**
Office of Gift Planning
401.874.7900 or 1.877.874.4555
foundation@uri.edu

Please return the form below to the **Office of Gift Planning, URI Foundation, 79 Upper College Road, Kingston, RI 02881**



SECURITIES TRANSFER FORM

My broker/brokerage firm is _____

I intend to transfer _____ shares of _____
on _____; the estimated value of my gift is \$ _____

My gift is to be used for _____

NAME (PLEASE PRINT) _____

ADDRESS _____

CITY / STATE / ZIP _____

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