

HOW TO GIVE A GIFT OF MUTUAL FUNDS



**Advancement
and Partnerships**

UNIVERSITY OF CENTRAL FLORIDA

PLEASE CONTACT

U.S. Bank, Philadelphia, PA Shaun Tillman

Phone: 215-761-9355

Fax: 844-744-5304

Email: shaun.tillman@usbank.com

PLEASE REFERENCE

Account Name: UCF FDN - Gift Clearing

Account Number: 001051003470

Mutual Fund transactions can take up to two weeks to process.

The gift date will reflect the date we receive the mutual fund.

The University of Central Florida Foundation, Inc.

A 501 (c) (3) tax-exempt organization: EIN # 59-6211832

PLEASE SEND NOTIFICATION OF TRANSFER AND THIS COMPLETED FORM TO

Craig Erwin

UCF Foundation

12424 Research Parkway, Suite 140

Orlando, FL 32826-3257

Phone: (407) 882-0304

Fax: (407) 882-1221

Email: craig.erwin@ucf.edu

DONOR INFORMATION

Donor Name: _____

Address: _____

City: _____ **State:** _____ **Zip Code:** _____

FUND INFORMATION

NAME

CUSIP

BROKER NAME

SHARES

ACQUISITION DATE

For corporate matching gifts please forward this form to matching@ucf.edu and include the matching company.

Thank you for your support of the University of Central Florida.