

# DTC TRANSFER INSTRUCTION SHEET

## IMPORTANT

**1** Please complete this form and forward it to your financial adviser.

**2** Please also forward a copy of this form to the University of Chicago Office of Gift and Records Services via fax at 773.702.9675, as donor information does not always transmit through the DTC wiring system.

If you have any questions, please contact Telly Green in Gift and Records Services at 773.702.2401 or via e-mail at [securitiesgifts@development.uchicago.edu](mailto:securitiesgifts@development.uchicago.edu).

\_\_\_\_\_  
TO (DONOR'S FINANCIAL ADVISER)

\_\_\_\_\_  
TELEPHONE

\_\_\_\_\_  
FAX

Please use this form as authorization to transfer the securities listed below from my account to Northern Trust/Chicago as my gift to the University of Chicago.

\_\_\_\_\_  
FROM (DONOR NAME)

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
TELEPHONE

\_\_\_\_\_  
FAX

\_\_\_\_\_  
NAME OF SECURITY

\_\_\_\_\_  
NUMBER OF SHARES

\_\_\_\_\_  
GIFT PURPOSE

\_\_\_\_\_  
WHO, IN ADDITION TO THE LEGAL DONOR,  
SHOULD RECEIVE RECOGNITION FOR THIS GIFT?

\_\_\_\_\_  
SIGNATURE

## DTC Transfer Instructions for Financial Advisors

For gifts of securities to the University of Chicago, please deliver by DTC to:

Northern Trust/Chicago  
DTC #2669  
Agent Bank #20290  
For further credit to  
The University of Chicago Account  
#26-80803

## IMPORTANT

For proper donor recognition, transfers must include the following information:

- Donor's name and address
- Name of security and number of shares
- Purpose of gift
- If applicable, additional names for joint recognition