



# MUTUAL FUND 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.

If you have any questions, please contact Telly Green in Gift and Records Services at 773.702.2401 or [securitiesgifts@uchicago.edu](mailto:securitiesgifts@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 Charles Schwab as my gift to the University of Chicago.

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

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
TELEPHONE

\_\_\_\_\_  
FAX

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

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

\_\_\_\_\_  
ALLOCATION PURPOSE

\_\_\_\_\_  
PLEASE LIST ADDITIONAL NAME FOR JOINT RECOGNITION

\_\_\_\_\_  
SIGNATURE

## Transfer Instructions for Financial Advisers

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

Charles Schwab  
Schwab's DTC#: 0164  
Code: 40  
Schwab mutual fund account:  
6716-4566  
Schwab's customer service number:  
800.435.9050

## IMPORTANT

Please remember to include the donor's name and address, name of security, number of shares, fund name, and gift purpose.