

SHARE GIVING FORM

For the donation of stocks, shares, bonds and unit trusts



Charity name: University of Oxford Development Trust Fund

PLEASE RETURN THIS FORM TO:

University of Oxford Development Office, University Offices, Wellington Square, Oxford OX1 2JD

ENQUIRIES: Tel +44(0)1865 611530 Fax +44(0)1865 611531 Email enquiries@devoff.ox.ac.uk www.development.ox.ac.uk

What do I need to do?

- Complete this form in BLOCK CAPITALS
- Send the signed original with your certificates (if held) to us at the address above
- If your holding is electronic, please inform your bank or stockbroker, and sign this declaration allowing the University's stockbroker to contact your broker, and send it to us at the address above
- American donors should contact Americans for Oxford, Inc: the University's primary charitable organisation in North America, that has been determined by the United States Internal Revenue Service to be a tax-exempt public charity with 501(c)(3) status (www.oxfordna.org)
- Canadian donors are welcome to use this form, but should be aware that supporting documentation must comply with European requirements

I wish to support Oxford by giving to:

- The University's greatest current needs
- A College*
- A Faculty/Department*
- A Museum/Library*
- Another area*
- Please tick here if you don't want your gift to receive public recognition

All gifts are made to the University of Oxford Development Trust Fund and will be placed in a broad purpose fund whose purposes most closely correspond to the preference you have indicated above.

Please see details over page..

*Please specify

My details

Name:

Address:

.....

Email:

Telephone:

My stockbroker's details

Name:

Address:

.....

Email:

Telephone:

What we will do

- It is the University's policy to sell donated shares upon receipt and reinvest the proceeds in its own portfolio
- If your holding is electronic, the University's stockbroker will contact your stockbroker and arrange for the shares to be transferred to the University for sale (this normally takes around two weeks)
- If your holding is in certificate form, this process can take four weeks

Details of stocks, shares, bonds and unit trusts

Company shares are in	Number of shares	Class of shares (ordinary, preference...)	Denomination (£1 share, 10p share...)

I give the University's stockbroker (Charles Stanley & Co Ltd, Oxford) express permission to contact my stockbroker or bank as named above

Signature:

Date:

PLEASE ENSURE THAT YOU SEND THE ORIGINAL SIGNED HARD COPY TO US

THANK YOU

The University's greatest current needs

By giving to the University's greatest current needs, you are maximising our opportunity to put your donation to immediate use, to benefit those who need your support most.

Data Protection

We want to ensure that we keep the details we hold about you up to date and communicate with you fully in accordance with your wishes. Your data will continue to be used for the purposes of communication and marketing activities by post, email, telephone, fax or text message unless you indicate otherwise. If at any time your details change or you wish to add to or remove from the list of communications sent to you then please contact us.

Your data are held securely in the University's shared Development and Alumni Relations System (DARS), which will help ensure your details are up to date and improve our communications with you. The data may be used by colleges, faculties, departments, administrative units, international offices, recognised alumni societies, sports and other entities associated with the University, and agents contracted by the University in that capacity.

Full details on how your data are held and used are set out in our Data Protection Statement at www.alumni.ox.ac.uk/data_protection or you can request a hard copy from the address below. Some sensitive personal data may be held in DARS. If at any time you have any queries about the use of your personal data in DARS, or wish to change the fact of, or extent of, use of your personal data, please contact the Database Team, quoting your Alumni Card number (if you have one), at: (post) University Offices, Wellington Square, Oxford OX1 2JD, United Kingdom; (email) database@devoff.ox.ac.uk; (tel) +44 (0)1865 611600.

The Charitable Status of Oxford University

All gifts donated to the University of Oxford Development Trust Fund will be placed in the broad purpose fund whose purposes most closely correspond to the preference you have indicated for the application of your gift. The gift will contribute towards the Oxford Thinking Campaign which has three main goals that are described throughout the pages of the Campaign website (www.campaign.ox.ac.uk). The University's priorities may change from time to time and donations are made and preferences for the application of such donations expressed without creating a new trust or imposing any other legal obligation on the Trust Fund.

The objects of the University of Oxford Development Trust Fund are to promote, assist and secure the advancement of education, learning, teaching, scholarship and research at or in connection with the University of Oxford, its Colleges and societies. The Trust Fund is administered by the University and established for a special purpose in connection with the University. It is therefore an exempt charity for the purpose of charity legislation. As such, it has full charitable status; albeit it is exempt from the requirement to register as a charity with the Charity Commission, and therefore does not have a Charity reference number. The Trust Fund's Inland Revenue reference number is XN80595.

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