



To Whom It May Concern:

In order to transfer a mutual fund to the University of Kentucky a shell account will need to be set up at the fund company where your shares are held. Our custodian bank, Northern Trust, will complete this process on behalf of the university.

To facilitate this process, please complete the mutual fund transfer information below and send by mail, fax or e-mail to:

UK Office of Philanthropy  
ATTN: Angelica Prekopa, Associate Director of Gift Receiving  
100 William B. Sturgill Building, Lexington, KY 40506-0015  
Fax#: (859) 323-9881  
E-mail address: a.prekopa@uky.edu

If you have any questions or need additional information, please contact Angelica Prekopa by phone at (859) 257-4761, or toll-free at (800) 875-6272.

Sincerely,

UK Office of Philanthropy

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Today's Date: \_\_\_\_\_

Mutual Fund Name: \_\_\_\_\_

Symbol: \_\_\_\_\_

CUSIP #: \_\_\_\_\_

Number of Shares or \$\$ Amount: \_\_\_\_\_

Name of Shareholder: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Contact Phone #: \_\_\_\_\_

Contact E-mail Address: \_\_\_\_\_

Donor Name(s): \_\_\_\_\_

Gift Designation: \_\_\_\_\_