



# Oxford Thinking

The Campaign for the University of Oxford

## SHARE GIVING FORM - for the donation of stocks, shares, bonds and unit trusts

Charity name: University of Oxford Development Trust Fund (OUDT)

PLEASE RETURN THIS FORM TO: University of Oxford Development Office, University Offices, Wellington Square, Oxford OX1 2JD

### What do I need to do?

- Complete this form in BLOCK CAPITALS.
- Please confirm whether your holding is in certificated or electronic form.
- If **certificated**, sign and send this form with your certificates (if held) to us at the address above. The transfer can take up to four weeks.
- If **electronic**, please inform your bank or stockbroker, and sign this declaration allowing the University's selected stockbroker to contact your broker, and send it to us at the address above. The transfer normally takes around two weeks.
- US donors should contact Americans for Oxford, Inc, which 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](http://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 Vice-Chancellor's General Fund
- A college\* .....
- A faculty / department\* .....
- A museum / library\* .....
- Another area\* .....

\* Please specify

### My details

Name .....

Address .....

Postcode .....

Email .....

Telephone .....

My share account number .....

### My stockbroker's details

Name .....

Address .....

Postcode .....

Email .....

Telephone .....

My share account number .....

### What the University will do

- It is the University's policy to sell donated shares upon receipt and reinvest the proceeds in its own portfolio.
- All gifts are processed by OUDT. If your wish is to support a college, OUDT will transfer your gift directly to the relevant college. In all other cases, your kind gift will be held in the specific OUDT fund which most closely corresponds to the area you wish to support.

### 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...)	Certificated or electronic (C = Certificated, E = Electronic)

I give the University's selected stockbroker 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**

#### 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. We use tools to monitor the effectiveness of our communications with you, including email tracking, which records when an email from us is opened and/or how many links are clicked within the message. The data from this tracking are generally used in an aggregated and anonymised form. 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 helps ensure your details are up to date and improves 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.campaign.ox.ac.uk/data-protection](http://www.campaign.ox.ac.uk/data-protection) or you can request a hard copy from our Database Team. 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 content or extent of use of your personal data, please contact the Database Team, quoting your alumni card number (if you have one), at the address given below, or email [database@devoff.ox.ac.uk](mailto:database@devoff.ox.ac.uk), or telephone (01865) 611600.

#### Charitable Status

Other than gifts for colleges, all gifts will be held in one of the specific broad-purpose funds within OUDT. The gifts will then be applied in accordance with the purposes of the relevant broad-purpose fund. Details of the broad-purpose funds and their purposes can be found at [www.admin.ox.ac.uk/trusts/oudt](http://www.admin.ox.ac.uk/trusts/oudt). Wishes expressed on this form will not give rise to new trusts or other legally binding obligations. Every gift will contribute towards the Oxford Thinking Campaign ([www.campaign.ox.ac.uk](http://www.campaign.ox.ac.uk)).

The objects of OUDT 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.

University of Oxford Development Office  
Wellington Square, Oxford, OX1 2JD United Kingdom  
T (01865) 611530 F (01865) 611531  
E [enquiries@devoff.ox.ac.uk](mailto:enquiries@devoff.ox.ac.uk) [www.campaign.ox.ac.uk](http://www.campaign.ox.ac.uk)

# THANK YOU