

## 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

Full Name ..... Date .....

Address .....

.....

Postcode .....

Email .....

Telephone .....

### My stockbroker's details

Full 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

#### How we use your data

The personal data you provide on this form will be used by the University of Oxford to process your donation in accordance with our contractual and legal obligations, and to meet our legitimate interest of alumni and supporter engagement, fundraising and stewardship. We will use your data to: record information about your giving, including any gift agreements, memberships, or correspondence relevant to your donation; communicate with you about the impact of your donation and other appeals that may be of interest to you; update your contact details and communication preferences; record your preferences regarding the external reporting of your donation; and record information about your willingness and capacity to support our charitable objectives, which may be provided by you or from information in the public domain.

#### Who has access to your data?

The data you provide will be stored and shared across the collegiate University of Oxford, including with its relevant clubs and societies if appropriate, in accordance with the University's policies and procedures via our shared relationship management system. You have the right to object to the processing of your personal data at any time. The University and participating colleges are both "data controllers", meaning you can contact either the University or your college if you have questions about your data.

We may also need to share it with third parties supporting the processing of your transaction. We will only do this in appropriate circumstances, for specified purposes, by secure means, using the minimum amount necessary, and with the relevant data sharing agreements in place. We do not and will not sell your data.

#### How long we keep your data

We consider our relationship with our alumni, donors and supporters to be lifelong and we will retain most of your data indefinitely unless you request otherwise.

#### Your rights

You have the right to opt-out of direct marketing at any time. You also have the rights to request access to and correction or erasure of your data; to request transfer of your data to another party; or to object to the processing of your data or request that such processing is restricted.

For full details on how we treat your information, including your rights, please see our Privacy Notice at [www.development.ox.ac.uk/privacy-notice](http://www.development.ox.ac.uk/privacy-notice) or you can request a hard copy from our Development team. If you would like to exercise your rights, opt-out, or are dissatisfied with the way we have used your information, please contact us at [database@devoff.ox.ac.uk](mailto:database@devoff.ox.ac.uk) or telephone +44 (0)1865 611530. You may also contact our Data Protection Officer at [dpo@ox.ac.uk](mailto:dpo@ox.ac.uk). If you remain dissatisfied, you may lodge a complaint with the Information Commissioner's Office at: <https://ico.org.uk/concerns/>

#### Charitable Status

All gifts are processed by the University of Oxford Development Trust Fund (OUDT). Your kind gift will be held in the specific OUDT fund whose purposes most closely correspond to the area you wish to support and shall then be applied in accordance with the purposes of the relevant fund. Details of the funds can be found at [www.admin.ox.ac.uk/trusts/oudt](http://www.admin.ox.ac.uk/trusts/oudt). Wishes expressed shall not give rise to new trusts or other legally binding obligations.

### Please ensure that you send the original signed hard copy to us

The objects of OUDT are to procure, 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. OUDT 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 registration number. OUDT's HMRC reference number is XN80595

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# THANK YOU