

DTC (Depository Trust Company) Transfer Instructions  
**\*Donor to Complete Before Shares/Securities are Sent\***

**Instructions to Donor:**

1. Once complete, please give the original copy of this authorization (**page 2**) to the delivering broker.
  
2. **Please email or mail a copy (or picture thereof) to the Avila University Advancement Team at [advancement@avila.edu](mailto:advancement@avila.edu) or**  
Avila University  
Attn: Advancement Department  
11901 Wornall Rd  
Kansas City, MO 64145

**FAQs for Completing this Form**

- We need a copy of this document (page 2) to understand how who is sending x shares, how they should be allocated upon receipt, and whom to receipt. **Even if your delivering broker has you fill out a separate (similar) form, it is vital that you return this completed form (page 2) first and foremost.**
    - This form should not be substituted by a broker-provided form.
  - **If you are unsure of the shares being sent, and only know that you wish for \$xxx amount of funds to be sent, consult with your delivering broker to determine what is being sent before sending any shares, or completing this form.**
  - If there are ever any questions, please contact either [advancement@avila.edu](mailto:advancement@avila.edu) or 816.501.3602
  - **Failure to not share this form (page 2) with Avila University's contact can result in a gift not being allocated or acknowledged for tax purposes.**
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DTC (Depository Trust Company) Transfer form – Gift of Stock/Securities

**\*Donor to Complete Before Shares/Securities are Sent\***

Please gift the following *[if unsure of the specific shares, consult your delivering broker]*

# of shares	Security Name	Symbol (optional)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**FROM:** My Account Number \_\_\_\_\_ **at** \_\_\_\_\_  
*(delivering firm)*

**TO:** UMB Bank NA Cust for TUA Avila University Special Account  
DTC # 2663  
Account # 13513500  
Tax ID # 43-1357092  
Agent & Institution #78810  
Internal account number # 90430D  
Interested Party ID # 64728

**Please designate my gift for** [provide specifics] as follows [full details, school, scholarship, contact, etc.]:

The following campaign, department, school, scholarship, etc. [Restricted Gift]:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Avila University [General Unrestricted Gift]:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date: \_\_\_\_\_

**Printed Name (Donor) and Address**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Printed Name (Donor) and Address**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*For questions, please contact the Advancement Team*

**Send this completed form to the Avila Advancement Team:**

Advancement Department  
Avila University  
11901 Wornall Rd  
Kansas City, MO 64145  
[advancement@avila.edu](mailto:advancement@avila.edu)  
816-501-3602