

DONATION FORM

IIT ROORKEE HERITAGE FUND (University of Roorkee Foundation)

Donor Name: _____

Address: _____

Email: _____

Phone: _____ Fax: _____

If Alumni: Degree _____ Branch _____ Year of graduation _____

Purpose of donation:

1. General Fund
2. Special (Directed) Fund – Please specify _____

I am donating by Check/ Stocks:

(i) Check Amount: _____ Check # _____

Please make checks payable to “**IIT ROORKEE HERITAGE FUND**”

(ii) Shares _____ (Quantity) of _____ (Corporation)
(Please fill attached DTC Form)

Please mail this form with check and/ or copy of DTC Form to:

Aditya Gupta,
Treasurer, IITR Heritage Fund
4353 La Cosa Ave
Fremont, CA 94536 USA

E-mail: adityangupta@yahoo.com

All donations are 100% tax exempt from IRS in the United States as applicable to individuals.

Date _____

Signature _____

IIT Roorkee Heritage Fund (University of Roorkee Foundation)

STOCK/ SECURITY TRANSFER INSTRUCTIONS

STOCK DONATION:

Donation of appreciated stock directly to heritage fund has a dual tax advantage: (i) you do not have to pay any capital gain tax (which you would pay if you were selling the stock) and (ii) donation is tax exempt from IRS in the United States as applicable to individuals.

Please follow these steps:

1. Fill-in DTC Transfer Request Form (attached). This is an authorization of transferring your stocks to IIT Roorkee Heritage fund.
2. Give the DTC form to your stock brokerage firm holding the shares to transfer the stocks in IIT Roorkee Heritage Fund account.
3. Send copy of DTC Transfer Request form by mail to IIT Roorkee Heritage Fund Treasurer at address listed below. The stocks will be sold immediately on receipt in the account to avoid market fluctuations.

Note that this DTC transfer request form is a standard form with all stock brokers. IIT Roorkee Heritage Fund account details are filled out for your convenience.

Address for mailing copy of DTC and Donation form:

Aditya Gupta,
Treasurer, IITR Heritage Fund,
4353 La Cosa Ave
Fremont, CA 94536

E-mail: adityangupta@yahoo.com

DTC Transfer Request

Date: _____

Attn: _____

This letter is to authorize a DTC transfer of the following position(s):

No of Shares	Symbol	Name
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

From: Firm _____
Account # _____
In the Name of _____

To: Charles Schwab & Co., Inc
Account # 7078-7733
In the Name of: IIT Roorkee Heritage Fund
DTC # 0164 Code 40

Thank you for your prompt attention.

Signature(s) _____

Name(s): _____

Phone #: _____

Address: _____
