



Stock Gifting Packet

IMPORTANT: If you are a Kootznoowoo shareholder and you wish to gift shares to a descendant, niece, nephew or sibling, please complete this affidavit and sign in front of a notary public.

I, _____ M.I. _____ Last Name
First Name (as it appears on Kootznoowoo Stock Certificate)

Date of Birth: _____ Social Security No.: _____

Complete Mailing Address

City _____ State _____ Zip Code _____

Under oath, depose as follows:

Before making this gift. I now own _____ shares of common stock of Kootznoowoo Incorporated.
I understand that the Alaska Native Claims Settlement Act U.S.C. § 1606) permits a shareholder to give a gift of share to his or her child, grandchild, niece, nephew, brother, or sister.
I attest that I am at least 18 years old.
I wish to make a gift of shares to the recipient(s) shown on the reverse of this document.
I understand that I cannot revoke, take back, or otherwise change this gift of shares once it has been made.
I understand that if there are taxes owed as a result of this transfer, Kootznoowoo Incorporated will not be responsible for payment, and that payment of any such taxes will be either my responsibility as donor or the recipient's responsibility.
I understand that my gift places in the hands of the recipient all authority to transfer these shares by will or gift; that I will no longer have voting rights for these shares; and that I will no longer receive dividends or distributions for these shares.
I understand that by signing this affidavit, I am swearing under oath to the best of my knowledge and belief that everything state herein is true, and that I am acting of my own free will and am not under any undue pressure, influence, or duress.
I affirm that I have not received anything of value nor was I promised anything of value as a compensation or payment for the stock I wish to transfer.

WAIT to sign this affidavit until you are in the presence of a notary public.

A NOTARY PUBLIC is an official witness who confirms your identity and signature.

•You can find this service at banks, law firms, and at any U.S. Post Office.

Dated this _____ day of _____
Day Month Year

Shareholder Signature

Subscribed and sworn to before me _____, at _____
Day Month Year City State

Notary Public in and for

My Commission Expires: _____
Month Day Year

IMPORTANT: List the name, address and social security number of each recipient and the number of shares you wish to give.

1.

Recipients First Name <small>(As it appears on Social Security Card.)</small>	M.I.	Last Name	Relationship to Donor
Recipient's Complete Mailing Address		City	State Zip Code
Date of Birth: _____ / _____ / _____	Social Security No.: _____		No. of shares to be gifted
<small>Month Day Year</small>			

2.

Recipients First Name <small>(As it appears on Social Security Card.)</small>	M.I.	Last Name	Relationship to Donor
Recipient's Complete Mailing Address		City	State Zip Code
Date of Birth: _____ / _____ / _____	Social Security No.: _____		No. of shares to be gifted
<small>Month Day Year</small>			

3.

Recipients First Name <small>(As it appears on Social Security Card.)</small>	M.I.	Last Name	Relationship to Donor
Recipient's Complete Mailing Address		City	State Zip Code
Date of Birth: _____ / _____ / _____	Social Security No.: _____		No. of shares to be gifted
<small>Month Day Year</small>			

4.

Recipients First Name <small>(As it appears on Social Security Card.)</small>	M.I.	Last Name	Relationship to Donor
Recipient's Complete Mailing Address		City	State Zip Code
Date of Birth: _____ / _____ / _____	Social Security No.: _____		No. of shares to be gifted
<small>Month Day Year</small>			

5.

Recipients First Name <small>(As it appears on Social Security Card.)</small>	M.I.	Last Name	Relationship to Donor
Recipient's Complete Mailing Address		City	State Zip Code
Date of Birth: _____ / _____ / _____	Social Security No.: _____		No. of shares to be gifted
<small>Month Day Year</small>			

Total Shares Transferred: _____ Shares retained by donor (if any): _____

I am making more than 5 gifts, I have copied this form and included the remaining names on the remaining pages

Family Tree

Step 2

The family tree is a visual history of your Native heritage. Start by filling in the recipient's name. Next, add the name and blood quantum of the recipient's parents and grant parents (both paternal and maternal). If you do not know the name or blood quantum of your family members, please fill this out to the best of your ability.

Completed by: _____

Date: _____

		Grandfather Tribe: _____ Blood Degree: _____
	Father Tribe: _____ Blood Degree: _____	Grandmother Tribe: _____ Blood Degree: _____
Recipient Tribe: _____ Blood Degree: _____		Grandfather Tribe: _____ Blood Degree: _____
	Mother Tribe: _____ Blood Degree: _____	Grandmother Tribe: _____ Blood Degree: _____

Release for Publication

I hereby consent to the publication of my name and hometown in the Kootznoowoo Shareholder newsletter or promotional materials published by Kootznoowoo Incorporated. I understand that this publication will take the form of an article, brochure or feature welcoming new shareholders or promoting stock gifting and may appear more than once.

Dated this _____ day of _____, _____
Day Month Year

Signature _____

Print name _____

*This form does not need to be signed in the presence of a notary public.

Release for Publication -Minor (Recipient under 18 years of age)

I, the undersigned parent or legal guardian of the minor child _____
First Name Last Name
("The Child"), consent to the publication of the Child's name and home town in the Kootznoowoo Shareholder Newsletter or promotional materials published by Kootznoowoo Incorporated. I understand that this publication will take the form of an article, brochure or feature welcoming new shareholders or promoting stock gifting and may appear more than once.

Dated this _____ day of _____, _____
Day Month Year

Signature _____

Print name _____

*This form does not need to be signed in the presence of a notary public.

IMPORTANT: If the recipient of a gift of Kootznoowoo Incorporated stock is less than 18 years of age, his or her parent or legal guardian may be appointed as a custodian of the shares. The shareholder who is gifting stock may also elect to act as custodian. This form must be completed by the custodian to accept the appointment.

In the matter of _____ a minor:
Minor First Name M.I. Last Name

This document appoints _____ as
Custodian First Name Last Name

custodian of all stock and other property that the above-named minor is and may later be entitled to receive from Kootznoowoo Incorporated, pursuant to the Alaska Native Claims Settlement Act ("ANCSA", 43 U.S.C. § et seq.) until the minor reaches age 18. This appointment complies with that Alaska Statute 13.46.085, as set forth on the following page.

Custodian Full Mailing Address:

City State Zip Code

The undersigned hereby consents to and accepts appointments as custodian for the above-named minor and agrees to receive and hold as custodian all stock and property distributed that the minor may be entitled to receive from Kootznoowoo Incorporated. The undersigned further agrees to collect, hold, manage, invest, and reinvest the custodial property in accordance with the Alaska uniform Transfer to Minors Act, as it may be amended or replaced from time to time. The undersigned acknowledges having read and understood Alaska Statutes 13.46.110 (both set forth on the reverse side of this page), which are sections of that Alaska Uniform Transfer of Minors Act that Addresses the appointment, powers and duties of custodians for minors.

Custodian's Signature: _____ Date: _____

Family or legal relationship of custodian to the above-named minor: _____

Alaska Statutes Excerpts from the Alaska Uniform Transfers to Minors Act

AS 13.46.085. Native Corporation; Custodians;

- a) The stock or membership in a corporation organized under the law of this state under the Alaska Native Claims Settlement Act (43 U.S.C. §§ 1601-1642) that a minor is entitled to receive under the Act shall be held by a custodian.
- b) A person making a transfer of stock, whether by gift, devise, or other method, may nominate a custodian. In the absence of a nomination, the custodian shall be determined under the order of priority set out below. The appointment becomes effective upon the corporation's receipt of the custodian's written consent to the appointment. The order of priority is:
 - 1) The legal guardian, if any, of the minor;
 - 2) A parent, if any, of the minor, as selected by the parents;
 - 3) An adult member of the minor's family, "in this paragraph, "member of the minor's family" has the meaning given in AS 13.46.990 and includes members of a family with whom the minor has customarily lived.
- c) For good cause, a district court or the superior court may vary the order of priority set out in (b) of this section or appoint another suitable person as custodian.
- d) The custodianship if governed by this chapter, as modified by the following:
 - 1) [Repealed, §§ 12, Ch. 60, SLA 1992]
 - 2) Under AS 13.46.150, third person is responsible for determining whether stock is inalienable under the Act;
 - 3) The custodian shall give an appropriate receipt for property received by the minor;
 - 4) The custodian may not alienate inalienable property received by the minor;
 - 5) The form of registration or title shall be "as custodian for _____(name of minor; First, M.I., Last) under the Alaska Natives Claims Settlement Act;
 - 6) A custodian may not receive compensation except, upon application to and approval by the superior court, for unusual and extraordinary services;
 - 7) Custodial property includes securities, money and other real and personal property under supervision as a consequence of the act.
- e) Notwithstanding AS 13.46.190, the stock shall be transferred to the minor when the minor reaches 18 years of age, or the minor's heirs if the minor dies before reaching 18 years of age.
- f) In this section.
 - 1) "Act" means the Alaska Native Claims Settlement Act (43 U.S.C. §§ 1601-1642);
 - 2) "Minor" means an individual who is less than 18 years of age.
 - 3) "Stock" means the stock or membership in a corporation that is organized under the law of this state under the act and that a minor is entitled to receive under the Act, whether by gift, devise, or other method; "stock" includes inchoate rights to stock.

AS 13.446.11. Care of Custodial Property

- a) A custodian shall:
 - 1) Take control of custodial property.
 - 2) Register or record title to custodial property in appropriated; and
 - 3) Collect, hold manage, invest, and reinvest custodian property
- b) In dealing with custodial property a custodian shall observe the standard of care that would be observed by a prudent person dealing with property of another and is not limited by any other statute except AS 13.90.020 restricting investments by fiduciaries. If a custodian has a special skill or expertise or is named custodian on the basis or representations of a special skill or expertise, the custodian shall use that skill or expertise. However, a custodian in the custodian's discretion and without liability to the minor or the minor's estate may retain custodial property received from a transfer.
- c) A custodian may invest in or pay premiums on life insurance or endowment policies on:
 - 1) The life of the minor only if the minor or the minor's estate is the sole beneficiary; or
 - 2) The life of another person in whom the minor has an insurable interest only to the extent that the minor, the minor's estate, or the custodian in the capacity of custodian is in the irrevocable beneficiary;
- d) A custodian at all times shall keep custodial property separate and distinct from all other property in a manner sufficient to identify it clearly as custodial property of the minor. Custodial property consisting of an undivided interest is so identified if the minor's interest is held as a tenant in common and is fixed.

Custodial property subject to recordation is so identified if it is recorded, and custodial property subject to registration is also identified if it is either registered, or held in an account designated, **in** the name of the custodian, followed **in** substance by the words: "as a custodian for _____ (name of minor) under the Alaska Uniform Transfers to Minors Act.

- e) A custodian shall keep records of all transactions with respect to custodial property, including information necessary for the preparation of the minor's tax returns, and shall make them available for inspection at reasonable interval by a parent or legal representative of the minor or the minor if the minor has attained the age of 14 years.

Answers to Your Questions

Below we have provided answers to commonly asked questions about the gifting process. If you do not find an answer to your question here, please contact the Kootznoowoo office with the information provided at the bottom of this page.

(Q) Who can give a gift of Kootznoowoo Shares?

(A) Any Kootznoowoo shareholder over age 18 can give shares as a gift.

(Q) Who can receive a gift of Kootznoowoo shares?

(A) A recipient can be the donor shareholder's child, grandchild, niece, nephew, brother, or sister, either by birth or by legal adoption that occurred before the child was 18 years old.

(Q) Does the recipient have to be an Alaska Native?

(A) A person who receives a gift of shares must be either an Alaska Native or a descendant of a Native, including adopted descendants. Therefore, a recipient need not have a particular blood quantum to be eligible to receive a gift of shares.

(Q) Why do shareholders give some of their shares away as gifts?

(A) Shareholders give shares as gifts for many reasons. For example, some do it to celebrate a child's birthday or high school graduation. Others do it to pass on shareholder benefits to their descendants, so they can enjoy them too. A sister might gift some shares to a younger sibling if they were born after December 18, 1971, the Alaska Native Claims Settlement Act (ANCSA) enrollment cut-off date.

(Q) How many shares can a shareholder give away?

(A) A shareholder can give any number of shares as a gift. They can give one share, five shares, twenty-five shares, or every share they own. It is up to the shareholder to decide; though we recommend, a shareholder give at least two shares.

(Q) Can a gift include a fraction of a share?

(A) No. The gift must be given in whole shares. For example, if a donor wishes to divide 50 shares among her three children, two of her children will receive 17 shares and the third one will receive 16.

(Q) Is a gift of shares to a minor any different than a gift to an adult?

(A) If the recipient is under age 18, the shares will be held by a custodian (usually the parent or legal guardian, or the donor of the gift) until the recipient turns 18.

(Q) What about a relative of a shareholder's husband or wife?

(A) The recipient must be related to the shareholder by blood or adoption, not by marriage. Therefore, you cannot gift shares to your spouse's niece or nephew.