

# Donation of Publically Traded Securities to Mount Saint Vincent University

Thank you for supporting Mount Saint Vincent University with a gift of securities.



## 1. Donor Information

Name of Account Owner (Full Name or Company Name) \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ Province / State \_\_\_\_\_ Postal / Zip Code \_\_\_\_\_  
Preferred Phone Number \_\_\_\_\_ E-Mail Address \_\_\_\_\_

## 2. Broker Information/Delivering Institution

Name of Company or Firm \_\_\_\_\_  
Donor Account # \_\_\_\_\_  
Name of Broker \_\_\_\_\_ CUID / DTC # \_\_\_\_\_  
Preferred Phone Number \_\_\_\_\_ E-Mail Address \_\_\_\_\_

## 3. Security Details

Name of Security _____	# of Shares _____	CUSIP / Fund # _____
Name of Security _____	# of Shares _____	CUSIP / Fund # _____
Name of Security _____	# of Shares _____	CUSIP / Fund # _____

## 4. Donation Designation

Name of Fund or Purpose of Donation \_\_\_\_\_

## 5. Authorization

I authorize this transfer as a charitable donation to Mount Saint Vincent University. I agree that Mount Saint Vincent University, or its agent, may contact my broker for the purpose of concluding this transaction.

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

### Your Donation Receipt

The value of the donation receipt is based on the closing price of the shares on the day the shares are received by the University.

## INSTRUCTIONS

- 1. Complete this form.** This information is needed for the transfer, tracking and receiving.
- 2. Give the form to your broker.** Your broker will arrange for the transfer of shares to Mount Saint Vincent University. The University cannot initiate a transfer. If you do not have a broker, fax this form directly to your investment firm.
- 3. Send a copy of the form to our broker (or ask your broker to do this):**  
RBC Investor & Treasury Services  
Christina Abboobakar  
T. 416-955-6285  
F. 416-955-6138  
E. christina.abboobakar@rbc.com
- 4. Send a copy of the form to Mount Saint Vincent University (or ask your broker to do this).** This will ensure that a receipt for income tax purposes is issued and your donation is allocated as intended.

University Advancement  
Erin Patrick  
T. 902-457-6694  
F. 902-445-3962  
E. erin.patrick@msvu.ca

**Transfer Securities in Kind to:**  
Mount Saint Vincent University  
CUID RTRA  
Account # 139611001

BNY DTC 0901  
Credit RBC account 298307,  
Final credit Mount Saint Vincent  
University 139611001

Canada Revenue Agency  
Charitable Registration Number  
11904 8049 RR0001