



UNIVERSITY OF CALGARY

## GIFT OF SECURITIES TO THE UNIVERSITY OF CALGARY

\*\*\* Upon completion of this form, the broker is asked to fax it to Scotia McLeod, so that they may initiate acceptance of the transfer. Fax #: (403) 298-4044 Attn: Tom Plunkett

\*\*\* Then mail the original copy to University of Calgary Development Office 2500 University Drive NW Calgary AB T2N 1N4 Attn: Anthony Salekin

### Donor Information:

Name: \_\_\_\_\_ Daytime telephone: ( ) \_\_\_\_\_  
Address: \_\_\_\_\_ Evening telephone: ( ) \_\_\_\_\_  
City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_ E-mail: \_\_\_\_\_

### Broker Information and Donor Authorization:

Client Account # \_\_\_\_\_

Name of Broker: \_\_\_\_\_ Firm and CUID: \_\_\_\_\_

Broker's ph: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ On or about Date of transfer: \_\_\_\_\_

	<u>NUMBER OF SHARES:</u>	<u>NAME OF SECURITY:</u>	<u>CUSIP:</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

This gift is made in support of the: \_\_\_\_\_

I wish to make a charitable gift consisting of listed securities to the University of Calgary. Further to this, please accept this form as my authorization for you to **transfer in-kind**, the above listed securities from my brokerage account to the University of Calgary custody account held at Scotia McLeod (trade settlement details below). It is my understanding that this transfer and gifting represents a disposition for which I will be provided with a donation receipt from the University of Calgary. The amount of the receipt will be based on the value as of the close of trading on the date they are received by the University of Calgary in their custody account.

Signature of Client: \_\_\_\_\_ Name: \_\_\_\_\_ Date: \_\_\_\_\_

### Electronic Transfer Information for the University of Calgary at Scotia McLeod:

For Canadian and US Securities CUID: SCOT & FINS #: T085

For Mutual Funds Fax Power of Attorney (filled out by donor's firm not donor) to 403-298-4044 ATTN: Bev Courtney - DEALER #9155

University of Calgary account # at Scotia McLeod: 423-433374-10

\*\*\* If donor is donating a Physical Certificate (which is registered in donor's name) they must sign the back of the certificate and provide Scotia McLeod with photo identification and this form as proof of intent.

**The contact at Scotia McLeod is Tom Plunkett 403-298-4052 or tom\_plunkett@scotiacapital.com.  
The contact at the University of Calgary is Anthony Salekin 403-220-7852 or asalekin@ucalgary.ca.**