



UNIVERSITY OF CALGARY

GIFT OF SECURITIES TO THE UNIVERSITY OF CALGARY

**** Upon completion of this form, the broker is asked to:

- 1) Fax or email a pdf to Scotia McLeod, so that they may initiate acceptance of the transfer.
 Fax #: (403) 298-4044 Attention: Chris Courtice Email: chris.courtice@scotiawealth.com
- 2) Email pdf copy to University of Calgary Development Office to sdahl@ucalgary.ca
 Or mail copy to 2500 University Drive NW OVC, Calgary, AB T2N 1N4 Attention: Sherry Dahl

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: _____

NUMBER OF SHARES:	NAME OF SECURITY:	CUSIP:
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 (CRA 108102864RR0001). 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 Governors of 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 Governors of 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: Chris Courtice

The Governors of the University of Calgary account # at Scotia McLeod: 423-43374-10

***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 Chris Courtice 403-770-2162 or chris.courtice@scotiawealth.com
The contact at the University of Calgary is Sherry Dahl 403-210-3873 or sdahl@ucalgary.ca