St.Thomas University

GIFTS OF MARKETABLE SECURITIES/SHARES TO ST. THOMAS UNIVERSITY

Donor procedure to initiate gifts of marketable securities/shares:

St. Thomas University is grateful to accept donations of marketable securities that are traded on a recognized stock exchange (e.g., TSE, NYSE). **Please note** that neither St. Thomas University nor the CIBC Wood Gundy office can initiate this transfer on your behalf.

A charitable receipt for income tax purposes will be issued by St. Thomas, in accordance with CRA guidelines, to reflect **the value on the day of trading that the University's stockbroker receives the securities** in negotiable form.

Please carry out the steps below to ensure the completion of your gift.

1. **Contact** your personal broker / transfer agent to request the electronic transfer of specified marketable securities as a donation, and provide St. Thomas University's broker information (CIBC Wood Gundy).
   Your broker will need to contact St. Thomas University's broker directly, citing the account number (noted below) to effect the transaction.

2. Complete and sign this form, and immediately fax/scan to St. Thomas's broker:
   CIBC Wood Gundy, Mais Reynolds Financial Group
   Attention: Debbie Sherstenka (506-451-8835)
   / Karen Robertson (506-451-8834)
   77 Westmorland Street, Suite 770
   Fredericton, New Brunswick, E3B 6Z3
   Toll Free: +1 (800) 268-8875 / Fax: (506) 451-8838
   Email: debbie.sherstenka@cibc.ca

   BANKING INFORMATION
   CIBC Wood Gundy # 280-05936-14
   DTC # 5030
   FINS # T079
   CUIDS # WGDB

3. **Send** a copy of this form to St. Thomas University's Advancement Office:
   Attention: Dionne Izzard
   51 Dineen Drive, MMH 420
   Fredericton, NB E3B 5G3
   Phone: 1-506-452-2140
   Email: dizzard@stu.ca

	Name of Shares / Mutual Funds	No. of Shares / Units	CUSIP No.	Value of Shares/Units
1				
2				
3				

Donor's Broker / Transfer Agent: Click here to enter text. Transfer Agent Representative: Click here to enter text.

Transfer Agent Representative's Contact information (Email and direct phone number not the 1-800): Click here to enter text.

Transfer Agent DTC No.: Click here to enter text.

Donor's Name: Click here to enter text. Phone: Click here to enter text.

Address: Click here to enter text. Email: Click here to enter text.

City: Click here to enter text. Province/State: Click here to enter text. Postal/Zip Code: Click here to enter text.

Signature: _____ Date: _____

Thank you for your generous support.