



One University. One World. Yours.

AGREEMENT TO DONATE PUBLICLY LISTED SECURITIES

- 1) **Prior to transferring securities to our account**, please fax this form to 902-420-5140:

Heather Fitzpatrick, Director of Development
Saint Mary's University, 923 Robie St., Halifax, NS B3H 3C3
Phone: (902) 496-8299 E-mail: heather.fitzpatrick@smu.ca

Date: _____

This letter will confirm my intention to donate the following to Saint Mary's University

Name of Issuer: _____

Type of Security: _____ Number of Units to be transferred: _____
(Shares, warrants, futures, bonds, bills, etc)

CUSIP # _____

Donor's name and address: _____

Designation: _____

Donor's Signature: _____

- 2) **Optional** – For purposes of assisting this transfer, your broker's name and phone number:

- 3) To transfer securities, please advise your broker of the following details:

Transfer to:

Scotia McLeod

1959 Upper Water St, 3rd Floor
Purdy's Wharf Tower 1
Halifax, NS B3J 3N2

Attention: Ken Dean
Phone: (902) 420-8707

Beneficiary: Saint Mary's University

Account No: 220-10101-19
BBS FINS # T085
CUID/DCS: SCOT
DTS: 5011

- 4) Please be advised that Canada Revenue Agency requires the charity to determine the fair value of the securities for tax receipting purposes. Generally, when the securities are easily liquidated, **a tax receipt will be issued for the closing price recorded on the day the securities are received into the account of Saint Mary's University.** The securities will be sold at the University's discretion. If you plan to donate securities that are not easily liquidated or are highly volatile, please call Maureen Hayward at 902-491-8658 beforehand to discuss valuation.