



**AGREEMENT TO DONATE PUBLICLY LISTED SECURITIES**

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

Jillian Gibson, Director of Philanthropy  
Saint Mary's University, 923 Robie St., Halifax, NS B3H 3C3  
**Phone:** (902) 491.6618      **E-mail:** [jillian.gibson@smu.ca](mailto:jillian.gibson@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

**Beneficiary: Saint Mary's University**  
Account No: 220-10101-19  
BBS FINS # T085  
CUID/DCS: SCOT  
DTS: 5011

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

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.