



UNIVERSITY OF  
CALGARY

## GIFT OF SECURITIES TO THE UNIVERSITY OF CALGARY

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

- 1) Send it to RBC Dominion Securities, so that they may initiate acceptance of the transfer.  
Email pdf copy to [dave.simpson@rbc.com](mailto:dave.simpson@rbc.com) or Fax #: (403) 299-7100 Attention: Dave Simpson
- 2) Email pdf copy to University of Calgary Development Office to [sdahl@ucalgary.ca](mailto: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: \_\_\_\_\_ Email: \_\_\_\_\_

### 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.		

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 RBC Dominion Securities (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 RBC Dominion Securities:

For Canadian and US Securities CUID: DOMA & FINS #: T002

For Mutual Funds - Dealer Rep: 9190 RSL and Mutual Fund Department fax: (416) 313 7493

The Governors of the University of Calgary account # at RBC Dominion Securities: 701 59770 15

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

**The contact at RBC Dominion Securities is Dave Simpson, 403-266-9651 or [dave.simpson@rbc.com](mailto:dave.simpson@rbc.com).  
The contact at the University of Calgary is Sherry Dahl, 403-210-3873 or [sdahl@ucalgary.ca](mailto:sdahl@ucalgary.ca).**