



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

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.