

## MOUNT ALLISON UNIVERSITY IS GRATEFUL FOR YOUR GIFT OF SECURITIES.

To donate publicly-traded securities, please ensure the following steps are completed:

- 1 Complete and sign this form and send to your broker. Your broker will be able to provide the DTC and the CUSIP numbers.
- 2 Have your broker e-mail this form to our contact person at RBC Dominion Securities, Ryan BeLong - Associate Advisor, at **ryan.belong@rbc.com**
- 3 Instruct your broker to complete the transfer of securities-in-kind to the University's account.
- 4 Inform Mount Allison of your pending gift of securities by contacting Elizabeth Fullerton, Manager of Advancement Services, Mount Allison University, at **efullerton@mta.ca** or **(506) 364-2341**.

A charitable donation receipt for income tax purposes will be issued based on the fair market value of the securities on the date (closing price) the securities are received into the University's brokerage account.

For questions about the gift of securities transfer process, please contact the University Advancement office at **donate@mta.ca** or **(506) 364-2259**.

Mount Allison University  
University Advancement  
62 York St. Sackville NB E4L 1E2  
CANADA

**mta.ca/development**

**CHARITABLE REGISTRATION #:**  
10772 6820 RR0001

THANK YOU FOR YOUR SUPPORT!

## SHARE DONATION TRANSFER FORM

### DONOR INFORMATION:

Donor Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

Prov/State: \_\_\_\_\_ Postal /Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### DONATION DESIGNATION:

Where would you like to direct your donation?

\_\_\_\_\_

### SECURITIES BEING TRANSFERRED FROM:

Delivering Institution: \_\_\_\_\_

Delivering Institution's DTC #: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Phone #: \_\_\_\_\_

Security Name: \_\_\_\_\_

CUSIP #: \_\_\_\_\_

# of Shares/Units: \_\_\_\_\_

Approximate Date of Transfer: \_\_\_\_\_

### SECURITIES BEING TRANSFERRED TO:

Account Name: Mount Allison University  
Account #: 286-19146-1-8

RBC Dominion Securities DTC #: 5002  
RBC Dominion Securities FINS #: T002

RBC Dominion Securities  
633 Main Street, Suite 650  
Moncton, NB E1C 9X9

Phone: **(506) 869-5474**  
Fax: **(506) 869-5460**  
Email: **ryan.belong@rbc.com**

Donor Signature: \_\_\_\_\_

Date: DAY \_\_\_\_\_ MONTH \_\_\_\_\_ YEAR \_\_\_\_\_