

# A GIFT OF SECURITIES TO SAINT PAUL UNIVERSITY

BUREAU DES DIPLOMÉS ET DU DÉVELOPPEMENT  
ALUMNI AND DEVELOPMENT OFFICE



UNIVERSITÉ SAINT-PAUL UNIVERSITY

To provide a gift of securities:

1. Contact your financial advisor or broker and provide them with the following so that they may initiate the transfer to our account:

**Charitable Registration No.** 10816 1282 RR0001  
**Financial Institution:** National Bank Financial  
**Contact:** Account number: 1T1-000000426.1 (CAD) / T1-000000426.2 (USD)  
Frank De Laborie Investment Advisor – Portfolio Manager  
Phone: 514-394-5459 Email: [Franck.DeLaborie@bnc.ca](mailto:Franck.DeLaborie@bnc.ca)

2. Please e-mail this form to [giving@ustpaul.ca](mailto:giving@ustpaul.ca) with attention to the Alumni and Development Office, so that we can notify our investment account manager to receive the gift and provide a tax receipt\* for your gift. If you or your financial advisor have any questions, please contact Pascale Thériault at 613-236-1393 Ext. 2009 or [ptheriault@ustpaul.ca](mailto:ptheriault@ustpaul.ca).

## DONOR AND SECURITIES INFORMATION

Name: \_\_\_\_\_ First Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Email: \_\_\_\_\_  
Telephone1: \_\_\_\_\_ Telephone2: \_\_\_\_\_

## SECURITIES

Name	# of actions	Approximate \$ Value
1.		
2.		

Approximate value of the gift: \_\_\_\_\_ Transfer date to SPU's account: \_\_\_\_\_

## INVESTMENT ADVISOR

Name: \_\_\_\_\_ First Name: \_\_\_\_\_  
Firm: \_\_\_\_\_  
Email: \_\_\_\_\_  
Telephone1: \_\_\_\_\_ Telephone2: \_\_\_\_\_

## DIRECTION TO GIFT SHARES

I hereby direct you to transfer the above named shares to Saint Paul University.

\_\_\_\_\_  
Signature of registered holder and donor\*\*

\_\_\_\_\_  
Date

*\*\*If this form is sent from the donor's personal email address, no signature is required.*

*\*A receipt will be issued for the donation amount. The donation amount is the value of the securities at the close of business on the day the securities are received in Saint Paul University's account.*