

# A GIFT OF SECURITIES TO SAINT PAUL UNIVERSITY

BUREAU DES DIPLOMÉS ET DU DÉVELOPPEMENT

ALUMNI AND DEVELOPMENT



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  
Account number: 11-X0RQ-A  
**Contact:** Martin Lacroix, Investment Advisor – Portfolio Manager  
Phone: 613-760-3451 Email: [Martin.Lacroix@nbc.ca](mailto:Martin.Lacroix@nbc.ca)

2. Please fax/e-mail this form to 613-782-3005 or [jwolfson@ustpaul.ca](mailto:jwolfson@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 Jeff Wolfson at 613-236-1393 Ext. 2593 or [jwolfson@ustpaul.ca](mailto:jwolfson@ustpaul.ca).

## DONOR AND SECURITIES INFORMATION

Name: \_\_\_\_\_ First Name: \_\_\_\_\_

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

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

Telephone 1: \_\_\_\_\_ Telephone 2: \_\_\_\_\_

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

Telephone 1: \_\_\_\_\_ Telephone 2: \_\_\_\_\_

## 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.*