

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

2. Please fax/e-mail this form to 613-782-3005 or fsimonyi@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 France Simonyi at 613-236-1393 Ext. 2293 or fsimonyi@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.