



Donation of Securities | Authorization to Transfer BMO Nesbitt Burns

The University of Western Ontario
Charitable Business Number
10816 2587 RR0001

The Process:

1. Forward the completed transfer form to your broker/investment advisor to initiate your electronic transfer of securities.

Western cannot initiate this transfer on your behalf.

2. Forward a copy of the completed transfer form to Western for our records. **Unexpected and/or unidentifiable transfers make it difficult to issue appropriate tax receipts.**

3. Please be advised that in normal circumstances, the value of the donation receipt will be based on the closing price of the security on the day the securities are received into Western's brokerage account, in accordance with our Board Policy and Canada Revenue Agency Regulations.

1) Donor Details

Corporation Name: _____ **OR**

First Name: _____ Initial: _____ Last Name: _____

Preferred Title: ☐ Ms. ☐ Miss ☐ Mrs. ☐ Prof. ☐ Mr. ☐ Dr. Anonymous: ☐ Yes ☐ No

Address: Street Number: _____ Street Name: _____ Apt#: _____

City: _____ Province: _____ Postal Code: _____

Home Phone: _____ Business Phone: _____ Email: _____

Preferred Point of Contact: ☐ Home ☐ Business Your Contact at Western: _____

2) Securities Transfer Authorization

A) Please submit to your broker to initiate the transfer

Broker/Institution: _____ Address: _____

Financial Advisor: _____ Business Telephone: _____

I hereby authorize a transfer of the following securities as a gift to The University of Western Ontario

Name of Shares: _____ Number of Shares: _____ Currency: ☐ CAD

From my account #: _____ ☐ USD

To the Western account at BMO Nesbitt Burns:

440-13512-10 T009
ACCOUNT # (Canadian) FIN # (Canadian)

440-13512-10 DTC 5043
ACCOUNT # (US) FIN # (US)

Contact Name: Bruce Andrews

Telephone: 519-646-1041 Fax: 519-679-8848

Donor Signature: _____ Date: _____

B) Please send a copy by fax to:

Advancement Operations
Suite 260, Westminster Hall, The University of Western Ontario
London, ON N6A 3K7

519-661-2111 x85282
Toll-free: 1-800-420-7519
Fax: 519-661-4182
Email: securities@uwo.ca

3) Purpose of the Gift

Please indicate the purpose of the gift and any instructions:

Thank you for your donation!

Privacy

Western respects your privacy. Personal information you provide will be updated on our database and used to provide you with a receipt for your gift or pledge, and provide information about events and activities, alumni programs and services, and fundraising.

At any time you have the right to request that your personal information cease to be used for alumni programs and services or for fundraising purposes. For more information or to make a request, please go to http://advancement.uwo.ca/about/privacy_policy.html or contact Advancement Services at (519) 661-4176, 1-800-420-7519, by fax at (519) 661-4182 or by email at advser@uwo.ca.

Value of Donated Securities

Your gift of publicly traded securities will be valued for receipting purposes at the close of day market value on the day the security is received in Western's brokerage account. Although donated securities are normally sold the same day they are received, there may still be a small fluctuation in value due to the difference between receipt and sale times. This in no way affects the value you will be able to claim on your tax return, which will be the value shown on your donation receipt.

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