

1. Donor Information (please complete)

Donor: _____ EmplID: _____ Constituency Type: _____

Donor Recognition Name: _____

Receipt Name: _____

Program: _____ Anonymous: ☐ Yes ☐ No Soft Credit: ☐ Yes ☐ No EmplID: _____
No EmplID? Fill out this soft credit form.

PLEASE PROVIDE COPIES OF ALL DOCUMENTATION OR CORRESPONDENCE RELATED TO THE GIFT

2. Donation Information (please complete)

One Time Gift Amount: \$ _____ - OR - Pledge Payment: _____ Pledge #: _____

Pledge Start Date: _____ Payment Frequency: _____ Pledge Period: _____

Fund Type: _____ Fund Manager: _____ Gift Agreement: ☐ Yes ☐ No

Account: _____ Fund: _____ Org Code: _____ Program or Project: _____

Name of Security: _____

Number of Shares/Units Received: _____ Price Per Share/Unit: \$ _____

Date Received: _____ Exchange Rate: _____

Structural Theme: _____

Priority Project or Fund Name: _____ Named Gift Opportunity: _____

Submitted: _____ Ext: _____ Date Submitted: _____

Gift Solicitor(s) _____

Comments: _____

3. Acknowledgement and Stewardship

Please note all donations to the University will receive a standard Thank-you letter from the VP External.

Please indicate if further acknowledgment is required in addition to the standard letter/tax receipt.

☐ Yes ☐ No

4. For Office Use Only

EmplID: _____ Campaign: _____ Appeal: _____ Designation: _____ Program: _____

Charity: ☐ UWO ☐ Fdn. Inc.

Advancement Services
Suite 260, Westminster Hall
Phone: 519-661-4176
Fax: 519-661-4182

Questions? Please contact Janice Van Der Klugt at
jburchil@uwo.ca or 519-661-2111 x85321

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.
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.

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.

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

519-661-2111 x85853
Toll-free: 1-800-420-7519
Fax: 519-661-4182
Email: securities@uwo.ca