



## SECTION 1 To be filled out by the donor

### Donor Details

Donor name \_\_\_\_\_

Name of legal owner of shares (if different from donor name above):  
\_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

Address for tax receipting \_\_\_\_\_  
\_\_\_\_\_

City \_\_\_\_\_ Province/State \_\_\_\_\_ Postal/Zip code \_\_\_\_\_

### Securities Information

To avoid any delays in the settlement of shares, please ensure the following fields are completed.

Broker name \_\_\_\_\_ Email \_\_\_\_\_

Name of shares	No. of shares	CUSIP number	CUID or DTC ID	Stock exchange

*I wish to make a charitable gift of listed securities to McGill University. Please accept this form as authorization to transfer the above-listed securities from my brokerage account to the McGill University Custody Account, held at CIBC Mellon (trade settlements details below). I authorize McGill University to contact my broker for the purpose of concluding this transaction.*

Designation or purpose of gift \_\_\_\_\_

Donor signature \_\_\_\_\_ Date \_\_\_\_\_

## SECTION 2 Transfer details for broker

CIBC Mellon Account Number: 420650

CIBC Account Name: RIAL MCGILL ADMIN

*For CAN securities being transferred:*

Charitable Business #11912 8981 RR0001  
CUID #CMTC

*For US securities being transferred:*

BNY Mellon  
DTC #0901  
Agent ID #00093034  
US Tax ID 98-6001153

## SECTION 3 To be filled out by McGill University Advancement

To: CIBC Mellon Account Number: 420650 Valuation:  Closing  Mean

Authorized by \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

### INSTRUCTIONS

For this transaction to be completed, Section 1 needs to be submitted as follows:

#### 1. By fax or email:

McGill University  
Fax: 514.398.2143  
securitiesdonations.alumni@mcgill.ca

#### By mail:

Donation Services  
McGill University  
1430 Peel Street  
Montreal, Quebec  
CANADA H3A 3T3

#### 2. Instructions for your broker

*McGill University needs the information in Section 1 - 24 hours before your broker proceeds with the transfer of shares.*

**For donations of mutual funds or physical certificates, please contact:**

Donation Services  
University Advancement  
securitiesdonations.alumni@mcgill.ca  
Phone: 514.398.2787  
Toll Free: 1.800.567.5175

#### For Canadian residents

The amount of the receipt will be based on the value of the securities, as of the close of trading, on the date the shares are received by McGill University.

#### For U.S. residents

The amount of the receipt will be based on the mean value of the highest and lowest selling price of the securities on the date they are received by McGill University.