



Designate your gift for a purpose close to your heart or for the University's greatest needs.  
You may transfer securities as a one-time gift, or as a payment on an existing pledge.

## **IMPORTANT—PLEASE COMPLETE ALL FIVE STEPS**

If any step is omitted, your stock transfer may appear unexpected or unidentifiable, and therefore be rejected for legal reasons. Please contact the Gift Planning Office at (416) 978-2214 with any questions about the process; we will be happy to assist.

### **STEP ONE—Check you are using the correct form**

This form is for gifts of American Stock. If your gift consists of Canadian Mutual Funds or Canadian Stock, please download the appropriate form: [Canadian Mutual Funds >](#) [Canadian Stock >](#)

### **STEP TWO—Complete all fields describing you and your stock**

#### **Donor Information**

Name for Charitable Receiving Purposes: \_\_\_\_\_

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

#### **Delivering Broker Information**

Brokerage Firm Name: \_\_\_\_\_

Broker Name & Telephone: \_\_\_\_\_ (    ) \_\_\_\_\_

CUID: \_\_\_\_\_ FINS: \_\_\_\_\_ Dealer/Rep Code: \_\_\_\_\_

#### **Market Security Information**

Name & Market Symbol \_\_\_\_\_ CUSIP \_\_\_\_\_

Class (if any): \_\_\_\_\_ Type (common, preferred, etc.): \_\_\_\_\_ Exchange (TSE, CDNX): \_\_\_\_\_

Number (Volume) of Shares/Units: \_\_\_\_\_ Estimated Market Value: \$ \_\_\_\_\_

#### **Gift Designation**

Highest priority needs of the University; or

Specific designation(s): \_\_\_\_\_

I have already spoken with a U of T Development Officer:  No  Yes (Name: \_\_\_\_\_)

### **STEP THREE—Declaration and signature**

The undersigned approves transferring the above noted shares as a charitable donation to the University of Toronto.

I understand all donated shares are sold immediately upon receipt. This value may be higher or lower than the value of my charitable gift receipt, with the receipted value based on the share's closing price on the day the shares are received into the University of Toronto account at State Street Trust Company Canada.

Signature of Donor: \_\_\_\_\_

Date: \_\_\_\_\_

## STEP FOUR—Instruct your broker

I have instructed my broker to initiate the electronic transfer of shares to:

State Street Trust Company Canada

DTC PARTICIPANT: **0997**

Account: **The Governing Council of the University of Toronto**

Account Number: **V75B**

**The Governing Council of the University of Toronto's Charitable Registration No. is 108162330RR0001**

## STEP FIVE—Return this completed form to the University of Toronto

In order to ensure a successful transaction of my donated shares, I am now returning a copy of this form to the Office of Gift Planning:

Fax: (416) 946-7574

E-mail: [gift.plan@utoronto.ca](mailto:gift.plan@utoronto.ca).

*Qualifying stocks include: shares, debt obligations or rights listed on a designated stock exchange, a share of the capital stock of a mutual fund corporation, a unit of a mutual fund trust, an interest in a related segregated fund trust, or a prescribed debt obligation.*

## THANK YOU FOR YOUR GIFT