

AGREEMENT TO DONATE PUBLICLY LISTED SECURITIES

1) Prior to transferring securities to our account, please email this form to development.office@smu.ca or fax to 902-420-5140:

Patricia MacArthur

Saint Mary's University, 923 Robie St., Halifax, NS B3H 3C3

Phone: (782) 641-5592 **E-mail:** patricia.macarthur@smu.ca

Date: _____

This letter will confirm my intention to donate the following to Saint Mary's University

Name of Issuer: _____

Type of Security: _____ Number of Units to be transferred: _____
(Shares, warrants, futures, bonds, bills, etc) **CUSIP #** _____Donor's name, phone, email _____
and mailing address: _____

Designation: _____

Donor's Signature: _____

2) Optional – For purposes of assisting this transfer, your broker's name and phone number:

3) To transfer securities, please advise your broker of the following details:**Transfer to:****Scotia McLeod**

1959 Upper Water St, 3rd Floor

Purdy's Wharf Tower 1

Halifax, NS B3J 3N2

Beneficiary: Saint Mary's University

Account No: 220-10101-19

BBS FINS # T085

CUID/DCS: SCOT

DTS: 5011

Attention: Ken Dean

Phone: (902) 420-8707

- 4) Please be advised that Canada Revenue Agency requires the charity to determine the fair value of the securities for tax receipting purposes. Generally, when the securities are easily liquidated, **a tax receipt will be issued for the closing price recorded on the day the securities are received into the account of Saint Mary's University.** The securities will be sold at the University's discretion. If you plan to donate securities that are not easily liquidated or are highly volatile, please call Chris Pennell at 902-420-5084 beforehand to discuss valuation.