

# Making a gift of stocks to Acadia University

Please complete and sign this Transfer Authorization Form (your broker can assist you). It authorizes your broker to transfer shares to Acadia University. Once completed, send a copy of the form to both BMO Nesbitt Burns and Acadia University by email or mail.

## BMO Nesbitt Burns

Attn: Tiffany Parady or Natacha Waring  
1400-1675 Grafton Street  
Halifax, NS B3J 0E9  
t: 1-844-686-2451  
e: tiffany.parday@nbpcd.com or  
natacha.waring@nbpcd.com

## Acadia University

Attn: Vicki MacCrimmon  
External Relations  
15 University Avenue  
Wolfville, NS B4P 2R6  
t: 1-866-222-3428  
e: externalrelations@acadiau.ca

**Acadia University Account #2800291318 | CUID NTD | FIN T009 | DTC #5043 (for US donors)**

Instruct your broker to transfer the shares to Acadia University. Alternatively, you can instruct your broker to contact us directly, or we can contact them at your request. Upon receiving the transferred securities into the CCS brokerage account, we will issue a charitable tax receipt based on the closing market value of the shares on the date of receipt.

## Transfer Authorization Form

### DONOR INFORMATION

Name: \_\_\_\_\_ Street Address: \_\_\_\_\_

City/Town: \_\_\_\_\_ Province: \_\_\_\_\_ Country: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

Gift Designation:  University Highest Need  Other: \_\_\_\_\_

I would like to have my name (and class year) on the donor list as: \_\_\_\_\_

I would like my gift to remain anonymous.

I have spoken to an Acadia University Donor Relations representative. Name: \_\_\_\_\_

Please have an Acadia University Donor Relations representative contact me to discuss allocating my gift.

I hereby authorize the transfer of the following securities to BMO Nesbitt Burns for credit to Acadia University.

**Donor Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

### BROKER INFORMATION

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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_ CUID: \_\_\_\_\_

Description of Security: \_\_\_\_\_ Number of Shares/Units to Transfer: \_\_\_\_\_

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Date of Transfer: \_\_\_\_\_

Thank you!

Charitable Registration Number: 10668 1893 RR0001

Revised October 2024

