

Making a gift of stocks to Acadia University

Complete the Donor Section of 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.parady@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 NTDT | 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 (Donor to complete)

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.

Donor Signature: _____ Date: _____

BROKER INFORMATION (Broker to complete)

Name: _____ Firm: _____

Phone: _____ Email: _____ CUID: _____

Description of Security: _____ Number of Shares/Units to Transfer: _____

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Description of Security: _____ Number of Shares/Units to Transfer: _____

Date of Transfer: _____

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

Thank you!

Charitable Registration Number: 10668 1893 RR0001

Revised November 2024

