

To be completed by the donor/owner of the securities and presented to his/her investment advisor.

Donor's Name _____

Address _____ City _____ Prov. _____ Postal Code _____

Home Phone Number _____ Work Phone number _____ Cell Phone Number _____ Email Address _____

THIS IS TO BE ACCEPTED AS MY DIRECTION TO THE FOLLOWING INVESTMENT FIRM/INVESTMENT ADVISOR TO TRANSFER PUBLICLY LISTED SECURITIES TO ST. MARY'S UNIVERSITY.

This direction is to:	To transfer from Account # _____
Investment Firm Name	Name of Securities and Symbol
Investment Advisor Name	Number of Shares
Advisor's Phone Number	Approximate Value per Share
Donation Restriction (if any): Please check one (v) <input type="checkbox"/> Most Urgent Need <input type="checkbox"/> Scholarships/Bursaries <input type="checkbox"/> Other:	
Please transfer the securities by electronic transfer or otherwise in negotiable form (i.e.: street name or appropriately endorsed) to: Richardson Wealth 4700-525 8 Ave SW Calgary AB T2P 1G1 CUID: GMPT For further credit to: St. Mary's University Account #61G-F9D0-A Contact: Tricia Leadbeater Ph: (403)260-8472 Fax: (403)269-7870 Tricia.Leadbeater@RichardsonWealth.com	
PLEASE FAX, SCAN OR DELIVER THIS COMPLETED FORM TO YOUR ADVISOR AND TO ST. MARY'S. ATTN: Thérèse Takacs VP Advancement & Campus Services St. Mary's University 14500 Bannister Rd SE Calgary AB T2X 1Z4 Direct: (403)254-3139 Cell: (587)577-8550 Fax: (403)254-3774 Therese.Takacs@stmu.ca The Development Office will contact you immediately upon confirmation the securities have been received.	I HEREBY AUTHORIZE THE TRANSFER OF THESE SECURITIES TO ST. MARY'S UNIVERSITY. This gift of securities is irrevocable. I understand that to receive a charitable tax receipt for the current tax year the securities must be received in the St. Mary's account on or by December 30, 2022 and that St. Mary's University is not responsible if the securities are not received in its account by that date. _____ Donor's Signature Date: _____

If you require assistance in transferring the securities or have any questions, please contact Thérèse Takacs at St. Mary's University at (587) 577-8550 or Therese.Takacs@stmu.ca.

St. Mary's University will issue a charitable tax receipt for the security's closing price on the date on which it is received in the St. Mary's account. Please allow 7-10 business days for processing.