

To be completed by the donor/owner of the securities and presented to his/her/their 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, CALGARY, CANADA**

<b>This direction is to:</b>	<b>To transfer from Account #</b> _____
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)

Scholarships/Bursaries       Other:

**Please transfer the securities by electronic transfer or otherwise in negotiable form (i.e., street name or appropriately endorsed) to:**

**Richardson Wealth**

Fidelity Clearing Canada

483 Bay St, South Tower, Suite 200

Toronto ON M5G 2N7 Canada

**CUID: FIDC**

**DTCC: 5040**

**ATTN: FCC Account Transfers**

For further credit to: St. Mary's University    Account #H14-W7G0-A

Contact: Tricia Leadbeater Ph: (403)260-8472 Fax: (403)269-7870 [Tricia.Leadbeater@RichardsonWealth.com](mailto:Tricia.Leadbeater@RichardsonWealth.com)

**PLEASE FAX, SCAN OR DELIVER THIS COMPLETED FORM TO YOUR ADVISOR AND TO ST. MARY'S UNIVERSITY.**

ATTN: Heather Hadden  
 Manager, Donor Relations & Stewardship  
 St. Mary's University  
 14500 Bannister Rd SE  
 Calgary AB T2X 1Z4  
 Direct: (403) 254-3739 Cell: (403) 478-4869  
 Fax: (403) 254-3774  
[Heather.Hadden@stmu.ca](mailto:Heather.Hadden@stmu.ca)

The Development Office will contact you immediately upon confirmation that 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, 2024 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 Heather Hadden at St. Mary's University at (403) 254-3739 or [Heather.Hadden@stmu.ca](mailto:Heather.Hadden@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 10-14 business days for processing.**