

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.

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)

Most Urgent Need 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

CUID: FIDC
DTCC: 5040

ATTN: FCC Account Transfers

Contact: Tricia Leadbeater

Ph: (403) 260-8472 Fax: (403) 269-7870

Tricia.Leadbeater@RichardsonWealth.com

For further credit to: St. Mary's University Account #H0E-4BG0-A

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

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

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, 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.

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.