

Gift of Publicly Traded Securities to Queen's University



Please download and complete this form to initiate the transfer of securities by sending this form to your broker and a completed copy to Queen's. Your broker can arrange for the electronic transfer of shares to our account.

In order to ensure your transfer is handled smoothly and efficiently, please first complete this form prior to transferring securities to our account and submit by fax or email to:

Queen's University
Attn: Gift Services, Old Medical Building
50-B Arch Street
Kingston, ON, K7L 3N6
613-533-2060 | 1-800-267-7837
Fax: 613-531-5523
Email: gifts@queensu.ca

Donor Information

Full Name _____

Address _____

City _____

Province _____

Postal Code _____

Phone _____

Email _____

Description of Securities – Equities/Mutual Funds/Bonds

If required, please work with your broker to complete the description of securities.

Security Description _____

Quantity _____

CUSIP/ISIN _____

Security Description _____

Quantity _____

CUSIP/ISIN _____



Broker/Delivering Custodian Information

Name of Firm

Name of Broker

Phone

Email

Client Account Number

Gift Designation

Highest priority needs of Queen's University

Specific Designation

Donor Authorization

I wish to make a charitable gift of the listed securities to Queen's University. Please accept this form as authorization to transfer the above securities from my brokerage account to the Queen's account held at CIBC Wood Gundy.

Signature

Date

Your broker can arrange for the electronic transfer of shares to our account:

CIBC/Wood Gundy

Toronto, ON

Account #: 470-01425-18

Queen's University #3

D.T.C.50

Attn: Bill Dobson

Phone: 613-531-5502

Email: William.dobson@cibc.ca

Thank you for your generous donation.

Your gift will help support teaching, learning, and innovative research at Queen's University that have an impact on communities around the world.

To donate your gift of securities to Queen's University, please follow the following steps.

1. Work with your broker to complete every section of the Gift of Publicly Traded Securities form
2. Send the completed Gift of Publicly Traded Securities form to Gift Services at Queen's University prior to transferring securities to our account by submitting by fax or email to:

Queen's University

Attn: Gift Services, Old Medical Building

50-B Arch Street

Kingston, ON, K7L 3N6

Phone: 613-533-2060 | 1-800-267-7837

Fax: 613-531-5523

Email: gifts@queensu.ca

3. Your broker can arrange the electronic transfer of securities to our account:

CIBC/Wood Gundy

Toronto, ON

Account #: 470-01425-18

Queen's University #3

D.T.C.5030

Attn: Bill Dobson

Phone: 613-531-5502

Email: William.dobson@cibc.ca