

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.**

<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)

Most Urgent Need     Supporting Student Achievement     Other: \_\_\_\_\_

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

**Richardson GMP Ltd.**

2000-525 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@RichardsonGMP.com](mailto:Tricia.Leadbeater@RichardsonGMP.com)

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

ATTN: Thérèse Takacs  
VP Advancement  
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](mailto: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 31, 2020 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](mailto: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.**