**GIFTS OF PUBLICLY TRADED SECURITIES TO THE TRU FOUNDATION SHARE TRANSFER FORM**

Please contact the TRU Foundation, Advancement at 778-471-8469 prior to the actual transfer of shares. Do not transfer securities to the TRU Foundation’s brokerage account before speaking to the TRU Foundation.

**In order to complete a trade:**

**Contact the Advancement Office Assistant at the TRU Foundation who will provide you with the appropriate brokerage account number.**

1. **Fax or email this form to the TRU Foundation at (250) 828-5265 or** [**jaroberts@tru.ca**](mailto:jaroberts@tru.ca)**.**
2. **Instruct your broker to initiate the trade and transfer shares to the TRU Foundation’s account.**

**To Be Completed By Donor:**

Name of Donor:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Daytime Phone #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor’s Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor’s Workplace (if applicable):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Donor’s Broker:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Broker’s Phone #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor’s Reference Acct. No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Donor’s Brokerage Firm:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* For donations of Canadian Securities please include Brokerage Firm CUID#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* For donations of US Securities please include Brokerage Firm DTC#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Security:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_# of Shares Transferred:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**FOR OFFICE USE ONLY**

**TRU FOUNDATION (102720) - Settlement Instructions with CWT; CAD: CUID-SSTA A/C: CWT1 USD: DTC#0997 A/C CWT3 – CWT Contact - Account Transfer Department, 300-750 Cambie St. , Vancouver, BC V6B 0A2 – Attn: David Cheng (604) 699-4907 at** [**CGSSecurities@cwbank.com**](mailto:CGSSecurities@cwbank.com)**, TRU Foundation Brokerage Contact Aon Canada Inc.; Ciaran Lynch: (416) 227-5773** [**DG-AH-Canada-PMTeam@aon.com**](mailto:DG-AH-Canada-PMTeam@aon.com)

Approx. Value of Each Share:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Approx. Total Amount of Donation:\_\_\_\_\_\_\_\_\_\_\_

Date of Transfer to the TRU Foundation Account: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I understand that I will receive a Gift-In-Kind tax receipt from the Thompson Rivers University Foundation, for the closing price, ***on the date the shares are received in the TRU Foundation’s account***, of these securities. These securities have been donated to the TRU Foundation without restriction and can be sold by the TRU Foundation at any time considered appropriate.

**Donor Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**