

Gift of Publicly Traded Securities to Queen's University



Please download and complete this form to initiate the transfer of securities to Queen's. 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 donate your gift of securities to Queen's University, please follow the following steps.

1. Download the Gift of Publicly Traded Securities form and work with your broker to complete every section of this 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:

Office of Advancement, Gift Services

Queen's University

Summerhill Building

55 Stuart 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

CUID: WGDB

Charitable Registration Number: 10786 8705 RR0001

Attn: Chris Kerans

Phone: 613-531-2929

Email: christopher.kerans@cibc.com

Donor Information

Full Name _____

Address _____

City _____

Province _____

Postal Code _____

Phone _____

Email _____

Gift of Publicly Traded Securities to Queen's University



Description of Securities – Equities/Mutual Funds/Bonds

I intend to donate the following securities to Queen's University. Contact your broker to aid in the completion of this section.

Security Description	Quantity	CUSIP/ISIN
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Security Description	Quantity	CUSIP/ISIN
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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

Gift of Publicly Traded Securities to Queen's University



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

CIBC/Wood Gundy **Attn:** Chris Kerans
Toronto, ON **Phone:** 613-531-2929
Account #: 470-01425-18 **Email:** christopher.kerans@cibc.com
Queen's University #3
D.T.C.5030
CUID: WGDB
Charitable Registration Number: 10786 8705 RR0001

Thank you for your generous donation.

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

Personal information is collected under the authority of the Queen's University Royal Charter of 1841, as amended, and in accordance with Ontario's Freedom of Information and Protection of Privacy Act and other applicable legislation, including the European Union's General Data Protection Regulation (GDPR) and is used for the purpose of alumni relations, fundraising and advancement activities. If you have questions about the information collected or how it will be used, please call the Office of Advancement, Queen's University at 613.533.2060, or 1.800.267.7837 or visit the [Office of Advancement Privacy Statement](#).

Office of Advancement
Queen's University
Kingston, Ont. K7L 3N6

613-533-2060 | 1-800-267-7837
alumni@queensu.ca

 **OFFICE OF
ADVANCEMENT**