



UNIVERSITY OF  
**ST. MICHAEL'S COLLEGE**  
IN THE UNIVERSITY OF TORONTO

## **TO DONATE SECURITIES TO THE UNIVERSITY OF ST. MICHAEL'S COLLEGE (USMC)**

Please complete all sections of the form on Page 2 and **email or fax** the completed form to each of the following:

**1.** USMC (ATTN: Lisa Gleva, Executive Director, Advancement [lisa.gleva@utoronto.ca](mailto:lisa.gleva@utoronto.ca) and/or Elizabeth (Betty) Noakes, Advancement Associate, Stewardship [betty.noakes@utoronto.ca](mailto:betty.noakes@utoronto.ca)); 416-926-2339 (fax)

**and**

**2.** Your Broker/Investment representative, and ask them to initiate the transfer.

Securities may be returned to your transferring institution if a copy of this form has not been emailed to USMC. Please be sure to include the CUID ID or DTC ID - this number is essential for the transaction to settle.

## **THANK YOU FOR YOUR GENEROUS SUPPORT**

If we can assist in any way, please contact:

Lisa Gleva  
Executive Director, Advancement  
[lisa.gleva@utoronto.ca](mailto:lisa.gleva@utoronto.ca)  
416-206-2125

Elizabeth (Betty) Noakes  
Advancement Associate, Stewardship  
[betty.noakes@utoronto.ca](mailto:betty.noakes@utoronto.ca)  
416-926-2251

81 St Mary Street, Toronto ON M5S 1J4  
[stmikes.utoronto.ca](http://stmikes.utoronto.ca)

## DONATION OF SECURITIES TO THE UNIVERSITY OF ST. MICHAEL'S COLLEGE (USMC) - TRANSACTION DETAILS

### DONOR INFORMATION

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Donor Name \_\_\_\_\_ Date: \_\_\_\_\_

Name of the legal owner of the share, if different from the donor name above \_\_\_\_\_

Preferred Telephone Number \_\_\_\_\_

Preferred Email Address \_\_\_\_\_

Preferred Address for Tax Receipting \_\_\_\_\_

City \_\_\_\_\_ Province/State \_\_\_\_\_ Postal/Zip Code \_\_\_\_\_

### DESIGNATION/PURPOSE OF GIFT (e.g., SMC St. Mike's Fund or SPECIFIC PROJECT)

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### SECURITIES INFORMATION

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Broker Name \_\_\_\_\_

Broker Firm \_\_\_\_\_

Telephone Number \_\_\_\_\_

Email Address \_\_\_\_\_

CUID ID (Canada) or DTC ID (U.S.) \_\_\_\_\_

I/We are completing a transfer/donation form to authorize and direct a **transfer-in-kind** of the following securities from the above noted account to the address and the account number noted below.

# of Shares	Name of Shares	Stock Symbol/SEDOL/ISIN/CUSIP # <sup>1</sup>	Country
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Signature of Donor \_\_\_\_\_ Date Signed \_\_\_\_\_

### TRANSFER DETAILS FOR BROKER/INVESTMENT REPRESENTATIVE

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Credit Account Number: 1004217 – USMC LTIP Fiera [University of St. Michael's College] B/N Registration Number: 11927 9321 RR 0001

#### Canadian securities – deliver to:

CIBC Mellon Global Securities Services Company

Security Level BIC CMTYCATTXXX

1 York Street, Suite 900

Toronto, ON M5J 0B6

INSTITUTIONAL ID:00095441

CUID: CMTC

PSET:CDSLCACTT

#### U.S. (DTC) securities – deliver to:

BNY Mellon

DTC Agent Bank #: 00093034

DTC Participant #: 0901

<sup>1</sup> Required as an identifier for the security being transferred; if you do not have a broker, then you will need to contact someone at your brokerage firm to confirm this information.