



When you make a gift of securities (stocks, bonds and mutual funds) to **Trinity Western University**, you are helping many students gain access to critical resources and ultimately be equipped for the good of the world and the glory of God. On behalf of our student, faculty and staff, **thank you** for your generosity!

1. Complete this transfer form and instruct your broker to transfer your securities directly to Trinity Western University's brokerage account.
2. Forward a copy of this completed form to [securitiesdonation@twu.ca](mailto:securitiesdonation@twu.ca) at least 24 hours before your broker proceeds with the transfer. Unexpected and/or unidentifiable transfers make it difficult to issue appropriate tax receipts.

*Please note that securities are transferred without restrictions and will be sold as soon as possible after they have been received. The value of the receipt will be based on the closing price of the securities the day the securities are received by Trinity Western University's broker.*

## SECTION 1: DONOR AND GIFT DESIGNATION

Organization Name \_\_\_\_\_ **OR**  
First Name \_\_\_\_\_ Last Name \_\_\_\_\_  
Preferred Title ☐ Ms. ☐ Miss ☐ Mrs. ☐ Mr. Anonymous ☐ Yes ☐ No  
Street Number \_\_\_\_\_ Street Name \_\_\_\_\_ Apt# \_\_\_\_\_  
City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_  
Email \_\_\_\_\_ Preferred Phone \_\_\_\_\_

### GIFT DESIGNATION

☐ Where Most Needed ☐ Specific Designation \_\_\_\_\_

## SECTION 2: SECURITIES TRANSFER AUTHORIZATION

Broker Name \_\_\_\_\_ Firm \_\_\_\_\_ CUID or DTC ID \_\_\_\_\_  
Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

### DESCRIPTION OF SECURITIES

|              |                      |                |                                                     |
|--------------|----------------------|----------------|-----------------------------------------------------|
| Symbol _____ | Name of Shares _____ | Quantity _____ | <input type="radio"/> CAD <input type="radio"/> USD |
| Symbol _____ | Name of Shares _____ | Quantity _____ | <input type="radio"/> CAD <input type="radio"/> USD |
| Symbol _____ | Name of Shares _____ | Quantity _____ | <input type="radio"/> CAD <input type="radio"/> USD |

I hereby authorize the transfer of the above noted securities as a gift to Trinity Western University

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

## SECTION 3: TRANSFER DETAILS FOR BROKER

**TWU Broker:** Dave Harder (Rep Code TRK) | **Associate:** Waleah Blais

**RBC Wealth Management** | **RBC Dominion Securities** | 2001 McCallum Road, Suite 301, Abbotsford, BC V2S 3N5

**Tel:** 604-755-8715 | **Fax:** 604-870-7171 | **Email:** [waleah.blais@rbc.com](mailto:waleah.blais@rbc.com)

**Account:** 808-14101-1-3 | **CUID:** DOMA | **FINS:** T002 | **DTC:** 5002 (US Securities)

