



## GIFT OF SECURITIES TO CONCORDIA — TRANSMITTAL FORM

**Thank you for considering a gift of securities to Concordia University. Support for research and higher education helps build a stronger tomorrow.**

For tax receipting purposes and to designate your gift, please fill out the following form and return to the coordinates below by email, mail or fax.

Donor's name (same as on the title of securities): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Designation of your gift (athletics, scholarships, libraries, etc.): \_\_\_\_\_

\_\_\_\_\_

Additional comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name of securities: \_\_\_\_\_

Number of shares transferred: \_\_\_\_\_

Approximate total value of donation: \_\_\_\_\_

Anticipated transfer date (mm/dd/yy): \_\_\_\_\_

Name of your broker: \_\_\_\_\_

Broker telephone number: \_\_\_\_\_

I understand that an official tax receipt will be issued to me (name identified above) based on the closing price on the date when the shares are received by Concordia University. My gift of securities has been made to Concordia University without restriction and will be sold immediately in accordance with Concordia University's related policies.

Signature: \_\_\_\_\_ Date (mm/dd/yy): \_\_\_\_\_

Send to: **Silvia Ugolini**

Principal Director, Planned Giving

Tel: 514-848-2424, ext. 8945 / Fax: 514 848-2826

**silvia.ugolini@concordia.ca**

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