

# DONATION OF STOCK OR SECURITIES FORM



\_\_\_\_\_  
NAME OF DONOR

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
DAYTIME PHONE

\_\_\_\_\_  
EMAIL

\_\_\_\_\_  
NAME OF DONOR'S BROKER

\_\_\_\_\_  
BROKER'S FIRM NAME

\_\_\_\_\_  
BROKER PHONE

\_\_\_\_\_  
BROKER EMAIL

\_\_\_\_\_  
NAME OF ACCOUNT

\_\_\_\_\_  
ACCOUNT #

\_\_\_\_\_  
NAME OF SECURITY

\_\_\_\_\_  
CUSIP#

\_\_\_\_\_  
# OF SHARES TRANSFERED

\_\_\_\_\_  
APPROX. VALUE OF EACH SHARE

\_\_\_\_\_  
APPROX. TOTAL DONATION

\_\_\_\_\_  
DATE OF TRANSFER TO UFV ACCOUNT

I understand that I will receive a **tax receipt for this donation of stock or securities for the closing value on the date they are received into the UFV brokerage account.** The stock or securities have been donated to the University of the Fraser Valley without restriction.

I would like my gift to be directed to the following project/fund:  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
SIGNATURE OF DONOR

\_\_\_\_\_  
DATE

## OFFICE USE ONLY

RECEIVING FIRM  
RBC Dominion Securities

ACCOUNT NAME  
University of the Fraser Valley

ACCOUNT #: 808 21739 18

CUID#: DOMA

DTC#: 5002

For mutual funds donation:  
\_\_\_\_\_

## CHECKLIST FOR YOUR CONVENIENCE

- Have you notified your broker of your intentions? If not, please instruct your broker to initiate the transfer on your behalf to the UFV brokerage account
- Please notify the UFV Relationship and Fund Development office prior to the actual transfer of securities.
- Once this form is completed please email a copy to [giving@ufv.ca](mailto:giving@ufv.ca), mail it to the address below, or make arrangements for us to pick up the form.

**UNIVERSITY OF THE FRASER VALLEY**  
Relationship and Fund Development  
Abbotsford campus  
33844 King Road  
Abbotsford, BC V2S 7M8  
604-854-4595 | [giving@ufv.ca](mailto:giving@ufv.ca)