



**GIFTS OF PUBLICLY TRADED SECURITIES TO THE TRU FOUNDATION  
SHARE TRANSFER FORM**

In order to complete a donation:

1. Donor completes this form with their brokerage firm and e-mails a copy to the National Bank Trust (NBT) contacts [john.downing@nbc.ca](mailto:john.downing@nbc.ca) (604.699.4860) and [OGV@bnc.ca](mailto:OGV@bnc.ca)
2. Donor e-mails a copy of the completed form to TRU Foundation, attention Lindsay Jones, at [foundation@tru.ca](mailto:foundation@tru.ca).
3. Delivering broker provides the NBT contacts with the settlement date when the delivery trade has been set up.
4. NBT will set up the free receipt for settlement on the date provided by the broker.

**To Be Completed by Donor:**

Name of Donor: \_\_\_\_\_ Daytime Phone # \_\_\_\_\_

Donor's Address: \_\_\_\_\_

Donor's Workplace (if applicable): \_\_\_\_\_

Delivering Brokerage Firm: \_\_\_\_\_ Donor's Brokerage Acct. No. \_\_\_\_\_

Brokerage Contact name \_\_\_\_\_ Phone: \_\_\_\_\_ E- mail: \_\_\_\_\_

- For donations of Canadian Securities please include delivering CUID# \_\_\_\_\_
- For donations of US Securities please include delivering DTC# \_\_\_\_\_

Name of Security: \_\_\_\_\_ Cusip: \_\_\_\_\_

# of Shares: \_\_\_\_\_ Expected Delivery Date: \_\_\_\_\_

Special Instructions: \_\_\_\_\_

**FOR USE OF THE DELIVERING BROKER – SETTLEMENT INSTRUCTIONS WITH NBT:**

Account No.: W1-000000005 (Thompson Rivers University Foundation)

CUID – NBCS (Canadian Securities) / DTC – 5008 (US Securities)

☐ Acknowledge NBT team has been notified of delivery. Transfer contact (if available) \_\_\_\_\_

Approx. Value per Share: \_\_\_\_\_ Approx. Total Donation: \_\_\_\_\_ Transfer Date: \_\_\_\_\_

I understand that I will receive a Gift-In-Kind tax receipt from the TRU Foundation, for the closing price, **on the date the shares are received in the TRU Foundation's account**, of these securities. These securities have been donated to the TRU Foundation without restriction and can be sold by the TRU Foundation at any time considered appropriate.

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

**NBT USE:**

Date Received \_\_\_\_\_ Value on Receipt CDN\$ \_\_\_\_\_