



To Transfer and Donate Securities In-Kind to the University of Guelph Securities Account

To Order your Donation of Securities:

Donor Name \_\_\_\_\_

Address \_\_\_\_\_

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

Firm \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Please accept this form with my signature as your authorization to transfer the following securities to the University of Guelph securities account as a charitable gift-in-kind.

Gift Designation \_\_\_\_\_

Or University's Highest Priority

\_\_\_\_\_  
Authorizing Signature (donor)

\_\_\_\_\_  
Date

No. of Shares	Name of Shares	Donor Account Number	Estimated Value and Currency (\$/CAD/USD)

To the Account of: University of Guelph  
Account: 551-10806-1-5, DTC: 5002, FIN: T002, CUID: DOMA  
RBC Dominion Securities  
42 Wyndham St. North, 3rd Floor, Guelph, Ontario, N1H 4E6  
Phone: 519-822-2083, Fax: 519-822-1982

Please send a completed and signed copy of this form to:

- 1) Your broker/advisor, to initiate the transfer to RBC;
- 2) [donate@uoguelph.ca](mailto:donate@uoguelph.ca) so the University and RBC can monitor for your gift and issue your charitable receipt in a timely manner.

For any questions please contact:

Alexis De Leon, Finance Manager, Gift Processing & Records, University of Guelph, Tel: (519) 824-4120 ext. 56530; Fax (519) 822-2670; email: [adeleon@uoguelph.ca](mailto:adeleon@uoguelph.ca) or Heather LeBar, RBC Dominion Securities Inc., Tel: (519) 822-2083; email: [heather.lebar@rbc.com](mailto:heather.lebar@rbc.com).



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### **Timing Considerations**

Gifts of securities can generally take 3-5 business days to transfer from the initiating broker/advisor to the University of Guelph's account. Processing the gift by our Treasury team may then take 2-3 business days, and charitable tax receipts are mailed through Canada Post (or on occasion emailed directly if requested). Gifts of mutual funds may take significantly longer to transact (2-4 weeks) as power of attorneys must be signed.

Please note there is risk in gifting shares, as the stock price may fluctuate between the time you authorize your broker to initiate the transfer, the time the broker initiates the transfer, and the 3-5 business days to transact. We recommend you discuss this with your broker to evaluate the securities you are choosing (i.e., are they volatile?), discuss how long it will take the broker to initiate the transfer to RBC, and we recommend you indicate to your broker to check the stock price again on the day they submit to RBC.

**If you are looking to make a gift within the calendar year, we recommend authorizing the donation through your broker/advisor no later than November 15 for mutual funds, and for all other publicly traded stocks no later than December 15.** For gifts made close to calendar year-end, please note depending on the University holiday shutdown period and gift volumes, your charitable receipt may arrive closer to the end of January via Canada Post. Thank you for your patience.

### **Charitable Donation Receipt Value**

The charitable donation receipt will reflect the fair market value of the shares on the date the gift is received by the University through RBC. The amount is based on the market value of the shares at the close of trading that day. This may be different than the fair market value of the shares on the date you sign this form (see note above on risk). For US securities, the exchange rate will be the Bank of Canada closing US/Canada rate for the day the shares were valued. The valuation of the funds for the purposes of crediting the designation account at the University will normally be the receipted value of the donated security.

Further details on the University of Guelph's Acceptance of Gifts of Marketable Securities can be found here: <https://www.uoguelph.ca/finance/policies-procedures/treasury-operationsinvestment-management-policies-and-procedures/acceptance>.

### **Gift Designation**

If you are uncertain what account name to designate your gift to, and you are not working directly with an advancement development manager on our team to help facilitate this information, please feel free to reach out to Jayne Whitfield, Gift Planning Manager, [whitfie@uoguelph.ca](mailto:whitfie@uoguelph.ca) to discuss your donation and intended use. Alternatively you can also look to our website to review account needs: <https://alumni.uoguelph.ca/>

*Thank you for supporting the University of Guelph.*

*You are helping to Improve Life every day for our students, researchers, faculty and staff.*