**St. Francis Xavier University**

**Development Office**

**Transfer Form for Gifts of Publicly Traded Securities**

To transfer gifts of stock to StFX from one brokerage firm to another.

**Procedure for Donor:**

1. Notify StFX Development Office of the pending transaction.

Development Office

St. Francis Xavier University

P.O. Box 5000

Antigonish, NS B2G 2W5

Phone:(902) 867-5182 Fax:(902) 867-5310 Email: wlangley@stfx.ca

1. Direct the broker to transfer the stock to BMO Nesbitt Burns Inc. – StFX’s broker and ask for the stock to be placed in the account listed as:

***GOVERNORS OF ST FRANCIS XAVIER UNIVERSITY***

***Account: 280-12547-11***

***DTC #: 5043***

***CUID #: NTDT***

Stipulate that the transfer is “in kind” which will ensure that the stock is transferred into the name of St. Francis Xavier University.

1. Complete the information in the form below and fax this to StFX at (902) 867-5310 or email bmmacdon@stfx.ca

|  |  |
| --- | --- |
| Name of Donor(s):   |  |
| Address: |  |
| Name of Donor’s Investment Firm:   |  |
| Name of Investment Advisor: |  |
| Investment Advisor’s Phone Number: |  |
| Name of Security: |  |
| Number of Shares transferred: |  |
| Approximate value per share: |  |
| Approximate total value of gift: |  |

1. Should you wish to speak directly with the BMO Nesbitt Burns Office , the Antigonish, Nova Scotia office handles the StFX account. Direct inquiries to:

Craig MacDonald

BMO Nesbitt Burns Inc.

303 Main Street, 2nd Floor

Antigonish, NS B2G 2C3

Phone: (902) 867-5620 or 1-888-636-7744

craig1.macdonald@NBPCD.com

I understand that I will receive a charitable tax receipt from St. Francis Xavier University for the closing price on the date that the shares are received in the StFX account.

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