



GIFTS OF PUBLICLY TRADED SECURITIES TO TRENT UNIVERSITY
SHARE TRANSFER FORM

Step 1: Inform the University of your intent to transfer a gift of securities (contacts listed below)

Step 2: Complete this form

Step 3: Request that your broker send the completed form to both:

- 1) Trent University: give@trentu.ca
2) Fiera Capital: mformusa@fieracapital.com & servicetoronto@fieracapital.com

Step 4: Once steps 1-3 have been completed, please initiate the transfer with your broker

Donor's Legal Name: Phone #:

Donor's Address:

Name of Donor's Broker: Broker's Phone:

Brokerage Firm: Broker's Fax:

Donor's Account Number:

Name of Security: # of Shares:

CUSIP # Requested date of transfer to Trent University's Broker: (YY/MM/DD)

Total estimated value of donation: \$ Estimated price per share \$

Please designate my gift to:

Trent University's Broker Information

Fiera Capital Corporation

Michael Formusa mformusa@fieracapital.com, 416 866-2494
3800-200 Bay St South Tower, Toronto, ON M5J 2J1 AND servicetoronto@fieracapital.com
www.fiera.com
Account # F475D

I understand that I will receive a Gift-In-Kind charitable receipt based on the closing price of these securities on the date of accepted transfer by the University's brokerage. These securities have been donated to Trent University without restriction, and by policy these shares will be sold at first opportunity after receipt. The amount available for use by Trent, for the purpose(s) I have specified, will be the amount at the time of the sale, and may include adjustments for currency exchanges and other factors.

Donor Signature: Date:

Trent Contacts:

Julie Gauthier: Donations Associate (705) 748-1601 juliegauthier@trentu.ca
Sherry Booth: AVP Philanthropy & Alumni Engagement: (705) 748-1011 ext. 7593 sbooth@trentu.ca

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