

Gift of Securities (Shares)

Step 1

Please complete all sections of the Securities Transfer Form attached.

Please note that under current tax rules the publicly listed securities you donate from a non-registered account will be exempt from capital gains tax **only if you transfer them in kind**. The capital gains tax exemption does not apply if you sell the securities first and then donate the cash proceeds to us. Your broker or investment advisor will provide the CUSIP # which acts like a transaction number in case the transfer needs to be tracked.

Step 2

Send a copy of the completed transfer form to UNBC's Office of Research and Innovation.

This step is important because securities are transferred without your name attached. When we receive the completed form, with the Donor Information, we can then provide you an accurate tax receipt and appropriate recognition of your valuable gift.

Contact

Office of Research and Innovation
3333 University Way
Prince George, BC, V2N 4Z9

Phone: 250-960-5750
Email: giving@unbc.ca

Step 3

Send a copy of the completed transfer form to your broker or investment advisor.

Your broker or investment advisor is responsible for initiating the transfer.

Additional Information:

- UNBC will only accept publicly traded securities.
- Following your donation, a charitable receipt will be issued for closing value of the securities on the day it is received by the University.
- UNBC's policy is to sell the donated securities within 90 days, but is generally done within one to three days.
- Consult your professional tax advisor on tax planning and tax matters.

Thank you for your generosity!



University of Northern British Columbia

Securities Transfer Form

From Donor to Broker

Donor Information (required for tax receipt purposes)

Name _____ Address _____

City _____ Province _____ Postal Code _____

Daytime Phone (____) _____ Additional Phone (____) _____

Email _____

Broker Information

Company Name _____ Contact Name _____

Phone (____) _____ Email _____

Transfer securities from:

Account # _____

Securities to be donated:

Security name # of units/shares CUSIP #/symbol

Security name # of units/shares CUSIP #/symbol

Approximate total value of gift \$ _____

Designation of gift _____

I authorize the University of Northern British Columbia, or its agent, to contact my broker for the purposes of concluding this transaction. And I acknowledge I will be issued at tax receipt for the closing value of the securities on the day it is received by the university.

Signature Date

Transfer securities to:

BMO Nesbitt Burns

CUID: NTDT

DTC#:

Acct # 835-02495-15

I.A. Code: I8T

Attn: Darren Masse

Phone: 250-614-4250

Email: darren.masse@nbpcd.com



Please send a copy of the completed form before proceeding with your securities transfer to:

Office of Research and Innovation
Email: giving@unbc.ca

If you have any questions regarding this form, please contact:

Office of Research and Innovation
Phone: 250-960-5750
Email: giving@unbc.ca

University of Northern British Columbia
CRA # 12162 7350 RR0001

Thank you for your gift!

unbc.ca