



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

Please contact the TRU Foundation’s Development Supervisor (250) 371-5715 prior to the actual transfer of shares. Please do not transfer securities to the TRU Foundation’s brokerage account before speaking to the TRU Foundation.

In order to complete a trade:

1. Contact the Development Supervisor at the TRU Foundation who will provide you with the appropriate brokerage account number.
2. Fax or email this form to the TRU Foundation at (250) 828-5265 or kgamracy@tru.ca.
3. Instruct your broker to initiate the trade and transfer shares to the TRU Foundation’s account.

To Be Completed By Donor:

Name of Donor: _____ Daytime Phone # _____

Donor’s Address: _____

Donor’s Workplace (if applicable): _____

Name of Donor’s Broker: _____ Broker’s Phone # _____

Donor’s Brokerage Firm: _____

Name of Security: _____ # of Shares Transferred: _____

FOR OFFICE USE ONLY

Approx. Value of Each Share: _____ Approx. Total Amount of Donation: _____

Date of Transfer to the TRU Foundation Account: _____

I understand that I will receive tax receipt from the Thompson Rivers University 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:** _____