UTS Foundation

# Gift of Publicly Traded Securities

UTS Foundation Charitable Business No: 85375 1964 RR0001

In order to initiate your gift transfer, please complete this form, send the original to your broker and return a copy to UTS Foundation, **Attention: David Haisell** (416) 978-3919 by **email to: advancement@utschools.ca**

**To:** _____
Name of Brokerage

**Attention:** _____ Email: _____ Phone: _____
*Name of Contact Person at Transferring Brokerage*

**FINS/CUID/DTC#:** _____ **Account #:** _____

## INSTRUCTIONS TO BROKER

I, hereby give authority to deliver free the following securities to UTS Foundation. Please deliver free:

**Account #** 7808029818
**Account Custodian:** Scotiatrust Transit # 81398
FINS # T525 CUID # BNSC
DTC (Dealer #) 4816 Intermediary Code: BNSG
REP. CODE: T525
(Mutual Funds: Dealer#: 9155, Rep#: RCC)

**Custodian Contact**: Ravi Joshi: torcustody@scotiabank.com / 416-866-7705

**Investment Manager**: Jarislowsky Fraser Global Investment Management | 1832 Asset Management L.P.
40 Temperance Street, 18th Floor, Toronto, ON M5H 0B4
Portfolio Admin Team: jflglobal@scotiabank.com / T: 416.933-2239

| # Units or Amt (CAD) | Description | Market Symbol | CUSIP/ISIN |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

Designation: ☐ Area of Greatest Need ☐ Bursary ☐ Catalyst Fund ☐ Other _____

Date: _____ Donor's Signature: _____

## DONOR INFORMATION

Name of donor for charitable receipting purposes: _____

Address: _____

City: _____

Province: _____ Postal Code: _____

Comments: _____

Please contact Scotia Trust by email: torcustody@scotiabank.com or by phone at 416.866.7705, if you have any questions about the Gift of Securities transfer process.

Your broker may contact Jarislowsky Fraser Global Investment Management | 1832 Asset Management L.P.at jflglobal@scotiabank.com.