



How to make a gift of securities to Huron

There are three ways in which a gift of securities can be made to Huron University College:

1. **By form** – please complete the attached form and send it to Kelly Hansen at ScotiaMcLeod, with a copy to Kristina Stankevich at Huron. ScotiaMcLeod facilitates gifts of securities for Huron.

2. **By e-mail** – a gift of securities can be made by email to kelly.hansen@scotiawealth.com with a copy to kstankev@huron.uwo.ca. The e-mail should be a letter of direction on the part of the donor indicating permission to sell the shares to Huron University College Foundation. The letter of direction should include:
 - a) the name of the donor
 - b) name of the company and number of shares
 - c) the Foundation's account number with ScotiaMcLeod which is **410-321-4518**
 - d) DTC number: 5011
 - e) FINS number: BBS T085
 - f) ScotiaMcLeod dealer code for Kelly Hansen: 9155

Other information which the donor may need:

ABA number: (i.e. routing code) 021000018

CCRA number: (i.e. charitable registration number) BN11896 5706 RR0001

3. Although less common, a gift of securities can also be made in the form of the physical receipt of shares, which Huron will arrange with ScotiaMcLeod to sell. The shares can be mailed to Kelly Hansen, ScotiaMcLeod, One London Place, 255 Queens Ave, Ste 900, London, Ontario, N6A

over please...

5R8, or to Huron University College Foundation, 1349 Western Rd, London, Ontario, N6G 1H3
(which will then give them to Mr. Hansen.)

Tax receipts

A tax receipt will be issued for the fair market value of the shares, which is based on the closing value of the shares on the day they are received by Huron University College Foundation (via ScotiaMcLeod in the above circumstances). For example, if the donor transfers the gift to ScotiaMcLeod on June 1, the tax receipt will be issued based on the closing value of the shares that day. The tax receipt will refer to the total number of shares given to Huron, the value of each share, and the name of the company whose shares are sold. (e.g. "100 shares of CIBC stock at \$60 per share")

For more information, please contact:

Kristina Stankevich
Director of Development
Huron University College
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