



**Gift of publicly traded securities to The Canadian Merit Scholarship Foundation**

**Thank you! We have prepared this form to expedite the process of making an in-kind gift of securities to The Canadian Merit Scholarship Foundation. We strive to make the process as easy and as efficient as possible.**

- For publicly listed securities that are highly liquid and priced daily, the transaction should take approximately **3 business days**, starting when your broker instructs its transfer department to effect the transfer and ending when the shares arrive in our account at RBC Dominion Securities.
- For less liquid securities, such as some mutual fund units, the process can take from **3-10 business days**.

For donors, the process involves two steps:

1. Please **complete this form** yourself or advise your broker to do so and **fax it to CMSF**, Attn. Business & Outreach Officer at **416-646-0846**. Upon receipt of a signed copy of this form, we will advise the transfer department at RBC Dominion Securities to expect the transfer and initiate the paperwork on the receiving institution's end. We will also contact your broker.
2. Please advise your broker to **call one of our brokers at RBC Dominion Securities**. Making our broker aware of the transaction will help to ensure a smooth transaction.

Barnaby Ross: 416-231-2229      Bev Holder: 416-231-2737

Upon receipt, the security(ies) will be valued as of the **close of trading on the date they are received**. A tax receipt will be issued to the donor for this amount. Should you have any questions concerning the transfer of securities, please contact our Business & Outreach Officer, Chris Cowperthwaite, at 416.646.2120, x223 or [chris.cowperthwaite@cmsf.ca](mailto:chris.cowperthwaite@cmsf.ca). We are happy to assist however we can.

**A. Please transfer the following position(s):**

Description of securities (1): \_\_\_\_\_ Symbol (CUISP/fund code) (1): \_\_\_\_\_  
Quantity (1): \_\_\_\_\_ Exchange: \_\_\_\_\_ Est. Market Value: \_\_\_\_\_  
Description of securities (2): \_\_\_\_\_ Symbol (CUISP/fund code) (2): \_\_\_\_\_  
Quantity (2): \_\_\_\_\_ Exchange: \_\_\_\_\_ Est. Market Value: \_\_\_\_\_

**B. Delivering institution information (donor's broker/advisor)**

Delivering institution name: \_\_\_\_\_  
Account name: \_\_\_\_\_  
Account #: \_\_\_\_\_ Delivering institution CUID: \_\_\_\_\_  
Broker/advisor: \_\_\_\_\_ Signature: \_\_\_\_\_ Phone: \_\_\_\_\_

**C. Receiving institution information (CMSF's broker)**

Receiving institution name: RBC Dominion Securities  
Account name: The Canadian Merit Scholarship Foundation      CRA Registration Number: 855-132643 RR0001  
Account #: 360-51709-1-3      Receiving institution CUID: DOMA  
Contact name: Barnaby Ross      Phone number: 416-231-2229

**D. Contributing client authorization:**

By this signature I hereby instruct my broker to effect the transfer described above to The Canadian Merit Scholarship Foundation's account.

Signature (donor): \_\_\_\_\_ Name: \_\_\_\_\_  
Date: \_\_\_\_\_ Full address: \_\_\_\_\_  
Phone: \_\_\_\_\_

I would like to be recognized in CMSF publications as: \_\_\_\_\_