



# THE inspire! CAMPAIGN

## DEVELOPMENT AND ALUMNI ENGAGEMENT

550 University Avenue, Charlottetown, Prince Edward Island C1A 4P3  
Telephone 902-894-2888 Fax 902-566-0782 [upei.ca/donate](http://upei.ca/donate)

### GIFTS OF MARKETABLE SECURITIES/SHARES TO THE UNIVERSITY OF PRINCE EDWARD ISLAND

#### DONOR PROCEDURE TO INITIATE GIFTS OF MARKETABLE SECURITIES/SHARES

The University of Prince Edward Island (UPEI) is grateful to accept donations of marketable securities that are traded on a recognized stock exchange (e.g., TSE, NYSE).

A charitable receipt for income tax purposes will be issued by UPEI, in accordance with CRA guidelines, to reflect the value ("average" of opening/closing share value) on the day of trading that the UPEI stockbroker receives the securities in negotiable form.

Please carry out both steps below to ensure your gift is completed.

1. **Contact your personal broker to request electronic transfer of specified marketable securities as a donation, and provide UPEI broker information (Note: Your broker will contact UPEI's broker directly to enact transaction):**

**SCOTIAMCLEOD**

98 Fitzroy Street  
P.O. Box 510  
Charlottetown, PE C1A 1R7  
Eddie Curran, Branch Manager—(902) 629-2578

2. Please complete, sign, and immediately fax to ScotiaMcLeod at (902) 368-8038, attention: Eddie Curran

Name of security ..... # of shares .....

Approximate value/share \$ ..... /share

Broker ..... Representative .....

Donor name ..... Phone .....

Address .....

City ..... Province ..... Postal code .....

Signature ..... Date .....

*Thank you for your generous support.*