



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):

SCOTIA WEALTH MANAGEMENT

98 Fitzroy Street
PO Box 1540
Charlottetown, PE C1A 1R7
Melanie Heron, Branch Administrator 902.629.2567

- 2. Please complete, sign, and immediately email to melanie.heron@scotiawealth.com

Name of security # of shares
Approximate value/share \$ /share Account #4671710517 CUID #SCOT
Broker Representative
Donor name Phone
Address
City Province Postal code
Signature Date

Thank you for your generous support.