

**1. Donor Information (please complete)**

Donor: \_\_\_\_\_ EmplID: \_\_\_\_\_ Constituency Type: \_\_\_\_\_

Donor Recognition Name: \_\_\_\_\_

Receipt Name: \_\_\_\_\_

Program: \_\_\_\_\_ Anonymus:  Yes  No Soft Credit:  Yes  No Emplid: \_\_\_\_\_  
No Emplid? Fill out this soft credit form.

PLEASE PROVIDE COPIES OF ALL DOCUMENTATION OR CORRESPONDENCE RELATED TO THE GIFT

**2. Donation Information (please complete)**

One Time Gift Amount: \$ \_\_\_\_\_ - OR - Pledge Payment: \_\_\_\_\_ Pledge #: \_\_\_\_\_

Pledge Start Date: \_\_\_\_\_ Payment Frequency: \_\_\_\_\_ Pledge Period: \_\_\_\_\_

Fund Type: \_\_\_\_\_ Fund Manager: \_\_\_\_\_ Gift Agreement:  Yes  No

Account: \_\_\_\_\_ Fund: \_\_\_\_\_ Org Code: \_\_\_\_\_ Program or Project: \_\_\_\_\_

Name of Security: \_\_\_\_\_

Number of Shares/Units Received: \_\_\_\_\_ Price Per Share/Unit: \$ \_\_\_\_\_

Date Received: \_\_\_\_\_ Exchange Rate: \_\_\_\_\_

Structural Theme: \_\_\_\_\_

Priority Project or Fund Name: \_\_\_\_\_ Named Gift Opportunity: \_\_\_\_\_

Submitted: \_\_\_\_\_ Ext: \_\_\_\_\_ Date Submitted: \_\_\_\_\_

Gift Solicitor(s) \_\_\_\_\_

Comments: \_\_\_\_\_

**3. Acknowledgement and Stewardship**

Please note all donations to the University will receive a standard Thank-you letter from the VP External.

Please indicate if further acknowledgment is required in addition to the standard letter/tax receipt.

Yes  No

**4. For Office Use Only**

Emplid: \_\_\_\_\_ Campaign: \_\_\_\_\_ Appeal: \_\_\_\_\_ Designation: \_\_\_\_\_ Program: \_\_\_\_\_

Charity:  UWO  Fdn. Inc.

## The Process

1. Forward the completed transfer form to your broker/investment advisor to initiate your electronic transfer of securities. Western cannot initiate this transfer on your behalf.
2. Forward a copy of the completed transfer form to Western for our records.
3. Please be advised that in normal circumstances, the value of the donation receipt will be based on the closing price of the security on the day the securities are received into Western's brokerage account, in accordance with our Board Policy and Canada Revenue Agency Regulations.

## Privacy

Western respects your privacy. Personal information you provide will be updated on our database and used to provide you with a receipt for your gift or pledge, and provide information about events and activities, alumni programs and services, and fundraising.

At any time you have the right to request that your personal information cease to be used for alumni programs and services or for fundraising purposes. For more information or to make a request, please go to [http://advancement.uwo.ca/about/privacy\\_policy.html](http://advancement.uwo.ca/about/privacy_policy.html) or contact Advancement Services at (519) 661-4176, 1-800-420-7519, by fax at (519) 661-4182 or by email at [advser@uwo.ca](mailto:advser@uwo.ca).

## Value of Donated Securities

Your gift of publicly traded securities will be valued for receipting purposes at the close of day market value on the day the security is received in Western's brokerage account. Although donated securities are normally sold the same day they are received, there may still be a small fluctuation in value due to the difference between receipt and sale times. This in no way affects the value you will be able to claim on your tax return, which will be the value shown on your donation receipt.

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