

Department of University Advancement 4104 HCI Building (Human-Computer Interaction) 1125 Colonel By Drive Ottawa ON KIS 5B6

Gift of Mutual Funds Form

Carleton University greatly appreciates your support. This form outlines the process for making an in-kind donation of mutual funds as seamless as possible.

If your broker has questions in connection with a mutual fund transfer, please contact:

Katie Stigter	
Gifts Administration Officer	
Carleton University	
1125 Colonel By Drive 4104 HCI Building Ottawa, ON K1S 5B6	Tel (613) 520-2600 ext. 4099 Fax (613) 520-3587 katie.stigter@carleton.ca

or

Personal and Planned Giving

Carleton University 1125 Colonel By Drive 4104 HCI Building Ottawa, ON K1S 5B6

Tel (613) 520-3636 Fax (613) 520-3587 plannedgiving@carleton.ca

Thank you for your generous donation. Your gift will help support teaching, learning and innovative research at Carleton University. Under current tax regulations, your donation of mutual funds is exempt from capital gains tax only when you transfer the mutual funds in-kind. To donate mutual funds, follow these simple steps:

Step 1: When donating mutual funds to Carleton University, Scotia iTrade must be advised of the donation.

The donor's broker may do so by e-mailing a letter of direction to <u>service@scotiaitrade.com</u>. **Questions can be directed to Scotia iTrade at 1-866-648-8566**

Step 2: In order to ensure your transfer is handled smoothly and efficiently, your broker should reference the following account information:

Account Number: 57261148-11 Transit Number: 75168 Account Name: Carleton University (Charitable Registration # 11883 8937 RR0001)

A charitable donation receipt will be issued to the donor based on the fair market value of the mutual funds once they are received into the University's account.

Personal information collected through this form will be used and disclosed by Carleton University under the authority of the *Carleton University Act*, and in accordance with sections 39, 41 and 42 of Ontario's *Freedom of Information and Protection of Privacy Act*. The purpose of this processing is for advancement activities and alumni development purposes. If you have any questions about the processing of personal information by Carleton University, please contact the Manager, Privacy & Access to Information, by phone at 613-520-2600 ext. 2047 or by e-mail via University_Privacy_Office@carleton.ca. You may also visit carleton.ca/privacy for additional information and notices.