

## 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 [service@scotiaitrade.com](mailto:service@scotiaitrade.com).

**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)

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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.