



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:

Melissa Forrest

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

Tel (613) 520-2600 ext. 8653
Fax (613) 520-3587
melissa.forrest@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 and Carleton University must be advised of the donation.

The donor's broker may do so by e-mailing a letter of direction to service@scotiaintrade.com and melissa.forrest@carleton.ca. 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 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.