

Letter of direction to transfer mutual fund units held at financial planning and mutual fund companies to Capilano University Foundation

To Financial Company/Agent

Account #

You are hereby directed to process the transfer of the following mutual fund unit(s) from my account with you as a charitable gift-in-kind:

Number of Units

Mutual Fund Name & Series

FOR DEPOSIT TO: FINS #: T089 CUID: MSLT DTC #: 5076

For: **Capilano University Foundation Account #: 1KB3Q0A0 (CAD) / 1KB3Q0B0 (USD)**
Raymond James Ltd., Suite 2100 – 925 West Georgia Street, Vancouver, BC V6C 3L2 | 604 654 1244 | treasury.group@raymondjames.ca

Please execute this transfer immediately and acknowledge receipt of this instruction by emailing a signed copy to: **treasury.group@raymondjames.ca; TransfersIn@raymondjames.ca**

I authorize Capilano University Foundation or its agent to contact my broker for the purpose of executing this transaction.

Donor Signature Date

Name

Guarantor Signature (stamped by bank or notary) Date

We acknowledge receipt of this instruction and have emailed a signed copy of this form to Raymond James at **treasury.group@raymondjames.ca; TransfersIn@raymondjames.ca**

Mutual Fund Company Signature

Telephone Email

Date

To ensure that donor(s) can be issued proper charitable donation receipts, mutual fund units held at the fund company must be signature guaranteed for Capilano University Foundation to accept these units.