



Gifts of Publicly Listed Securities

Thank you for your interest in giving a gift of securities to the Canadian Friends of Tel Aviv University. The following information will help in processing your gift.

Please instruct your broker to transfer your gift of securities electronically as outlined below. Then, complete the accompanying Security Transfer Information Form and return it to the Canadian Friends of Tel Aviv University as soon as possible.

To transfer your gift of securities electronically:

Have your broker send your gift to the Canadian Friends of Tel Aviv University's broker at:

Broker: Echelon Wealth Partners
CUID #: FIDC
Dealer Code: 7862
Account #: E125590A

Canadian Friends of Tel Aviv University's contact person at Echelon Wealth Partners is:

Matthew Graham
Investment Advisor Assistant
Echelon Wealth Partners
181 Bay St East, Suite 2500
Toronto, ON M5J 2T3
Phone: 647-689-8710
Email: mgraham@echelonpartners.com

Your Canadian Friends of Tel Aviv University contact person is:

Liana Shlien
Manager, Administration and Operations
Canadian Friends of Tel Aviv University
3130 Bathurst St, Suite 214
Toronto, ON M6A 2A1
Phone: 416-787-9930
Toll Free: 1-833-32-CFTAU (22328)
Email: info@cftau.ca



Security Transfer Information Form

(to be completed and returned by donor and donor's representative)

Description of Your Gift:

Description of Securities: _____

Date of Transfer: _____

Gift to be used for: _____

Personal Information:

First name: _____ Last Name: _____

Address: _____

Telephone: _____ Email: _____

Your Broker's Information

Broker's Name: _____ Company: _____

Telephone: _____ Email: _____

Value of your donation: _____

Once the Canadian Friends of Tel Aviv University accepts your gift, and the transfer has been completed, we will issue you a tax receipt. The value of your tax receipt will be based on the closing price of the share on the day the donation (transfer of ownership) is completed.

Donor Signature: _____

(signature means I have instructed my broker to initiate transfer of securities)

Please return this form to:

Liana Shlien
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