



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:

Francis Pope
Senior Investment Advisor
Echelon Wealth Partners
181 Bay Street, suite 2500
Toronto ON, M5J 2T3
Phone: 647-253-1173
Fax: 647-439-1550
Email: fpope@echelonpartners.com

Your Canadian Friends of Tel Aviv University contact person is:

Meira Alon
Office Manager
Tel Aviv University Canada
Ottawa, Quebec and Atlantic Canada
6900 Decarie Boulevard, Suite 3480
Montreal, QC H3X 2T8
Phone: 514-344-3417 ext.351
Email: meira@cftau.ca

Ottawa, Quebec and Atlantic Canada
3480 – 6900 Decarie Boulevard
Montreal, Quebec
H3X 2T8

montreal@cftau.ca

www.cftau.ca

Charitable registration number: 124035643RR0001



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 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:

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