



## 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:

Jeff Wagman  
Vice President, Investment Advisor  
Echelon Wealth Partners  
1 Adelaide St East, 20<sup>th</sup> Floor  
Toronto, ON M5C 2V9  
Phone: 416-350-3367  
Fax: 416-350-3234  
Email: [jwagman@echelonpartners.com](mailto:jwagman@echelonpartners.com)

Your Canadian Friends of Tel Aviv University contact person is:

**Ilana Hirt**  
**Director of Development**  
**Canadian Friends of Tel Aviv University**  
**Ontario and Western Canada**  
214 – 3130 Bathurst Street  
Toronto, ON M6A 2A1  
Phone: 416.787.9930 ext. 107  
Email : [ilana@cftau.ca](mailto:ilana@cftau.ca)

**Heather Mlynarski**  
**Office Coordinator**  
**Canadian Friends of Tel Aviv University**  
**Ottawa, Quebec and Atlantic Canada**  
6900 Decarie Boulevard, Suite 3480  
Montreal, QC H3X 2T8  
Phone: 514-344-3417 ext.351  
Email : [heather@cftau.ca](mailto:heather@cftau.ca)

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[www.cftau.ca](http://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 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:

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**Director of Development**  
**Canadian Friends of Tel Aviv University**  
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