

# FORM 3 Direction to transfer ownership of mutual funds held at financial planning and mutual fund companies to Simon Fraser University

## Donor Information

Donor Name ..... E-mail Address .....

Phone Number ..... Mailing Address .....

Gift Designation .....

Financial company/agent ..... Account # .....

## Number of units

## Mutual fund name

.....	.....
.....	.....
.....	.....
.....	.....
.....	.....

### FOR DEPOSIT TO:

FINS #T009  
CUID NTDT  
DTC #5043  
FOR: "SIMON FRASER UNIVERSITY" ACCOUNT NUMBER #805-05287-13

BMO NESBITT-BURNS, VANCOUVER BC  
DON FOSTER TEL 604.631.2611  
EMAIL DON.FOSTER@NBPCD.COM

## Donor Consent

## Donor Signature (printed version only)

Date:

\_\_\_\_\_

- ☐ Please execute this transfer immediately and acknowledge receipt of this instruction by emailing a scanned signed copy to (Attn: Don Foster) [don.foster@nbpcd.com](mailto:don.foster@nbpcd.com) via a secure email service, encrypted for security. I authorize Simon Fraser University or its agent to contact my broker for purposes concluding this transaction.
- ☐ I acknowledge receipt of this direction to transfer and consent to a copy of this form being sent to SFU's Corporate Investment Advisor Don Foster [don.foster@nbpcd.com](mailto:don.foster@nbpcd.com) and SFU Advancement Administration [pgadmin@sfu.ca](mailto:pgadmin@sfu.ca) via a secure email service, encrypted for security.
- ☐ I understand that 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 Simon Fraser University to accept these units.

