

# Gift of Securities Transfer to United Way of Thunder Bay



Charitable Registration Number: 129820387RR0001

## A. Securities to be transferred from:

Name \_\_\_\_\_ Account Number \_\_\_\_\_

Address \_\_\_\_\_

Phone/Fax \_\_\_\_\_ Email Address \_\_\_\_\_

I would like to be recognized in the Leaders of the Way Program:  Yes  No

I would like my Recognition Name to appear as:

\_\_\_\_\_

Broker's Name \_\_\_\_\_ Financial Institution \_\_\_\_\_

Broker's Address \_\_\_\_\_

Broker's Phone/Fax \_\_\_\_\_

## B. Securities to be transferred:

You are hereby directed to transfer the following securities from my account electronically to BMO Nesbitt Burns, for deposit to United Way of Thunder Bay

Number of Shares \_\_\_\_\_ Name of Security \_\_\_\_\_

\$ \_\_\_\_\_ \$ \_\_\_\_\_  
Approximate Value of Each Share \_\_\_\_\_ Approximate Total Amount \_\_\_\_\_

Date of Transfer to United Way's Account \_\_\_\_\_

\*\* A charitable tax receipt will be issued for the closing price of the securities on the day of the transfer to United Way. All securities are sold on the same day as received by United Way\*\*

Signature of Donor \_\_\_\_\_ Date \_\_\_\_\_

Please help us handle and acknowledge your gift appropriately by scanning and emailing this form to Garth Postans: [Garth.Postans@nbpcd.com](mailto:Garth.Postans@nbpcd.com)

## 4 Easy Steps to Follow to Complete your Gift of Securities

1. Share this form with your broker and indicate the type and quantity of shares you would like to donate.
2. Your broker will complete the form for you to sign on the bottom line.
3. Your broker will transfer the completed signed form to the United Way brokerage at BMO Nesbitt Burns
  - a. Email to Garth Postans at [Garth.Postans@nbpcd.com](mailto:Garth.Postans@nbpcd.com) or
  - b. Call Garth Postans at (807) 346-7093

We will be notified from our broker at BMO Nesbitt Burns regarding the transfer and we will issue you a charitable tax receipt for your records.