



Charitable Donation of Securities Share Transfer Authorization Form

Attention _____
Full Name of Your Broker

Please accept this form as authorization to transfer _____
Number/Amount

shares of _____
Name of Shares/Company

currently held by _____
Your Brokerage Firm

from account _____
Your Account Number

This donation of securities will be transferred through Waterloo Region Community Foundation's brokerage firm, **BMO Nesbitt Burns**:

Account # 385-03921-13
FINS # T009
CUID # NTDT
DTC # 5043

Contact Person **Andrew Campbell**
Telephone 519-886-3288
Fax 519-747-2236
Email andrew2.campbell@nbpcd.com

Your Name

Address

City and Province

Postal Code

Telephone Number

Email address

Waterloo Region Community Foundation fund to receive donation of securities

Donor Authorization:

Signature

Date

How to Donate Securities

- Fill out this form.** Note: we're comfortable accepting a form with an e-signature, as long as your broker/investment advisor accepts this format as well.
- Forward the completed form to your broker/investment advisor** to initiate the electronic transfer of the securities (WRCF can't initiate the transfer on your behalf). If you self-manage your investments, contact John Bowden at WRCF to guide you through the process.
- Forward a copy of the completed form to Andrew Campbell at BMO Nesbitt Burns.** BMO must receive a copy of the form directly from you or your advisor.
- Forward a copy of the completed form to Dan Robert at WRCF.**
- A tax receipt will be issued to you** for the closing price of the securities on the day they are received by BMO.

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Kitchener, ON N2G 1A3
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Website: www.wrcf.ca
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