

# Charitable Donation of Securities in Kind

* Mandatory Fields					Donor/Transferor Information				
Primary Account Holder - Last Name *			First Name *			Telephone			
						( )			
Joint Account Holder - Last Name *			First Name *			Telephone			
						( )			
Street Address			City		Prov.	Country		Postal Code	
Financial Institution Contact *					Telephone *			Email	
					( )				
Financial Institution Name *					Account No. *			CUID	
Charitable Organization/Transferee Information									
Name of Charitable Organization / Transferee *									
Street Address *			City *		Prov. *	Country *	City *		
Charity Contact *					Telephone *			Email	
					( )				
Financial Institution Contact *					Telephone *			Email	
					( )				
Financial Institution *					Account No. *			CUID	
Additional Settlement Instructions (as required)			<input type="checkbox"/> see attached *						
Request Details									
<ul style="list-style-type: none"> <li>Please accept this form as authorization to gift/transfer the following securities/cash held in my/our account to the transferee account indicated above.</li> <li><b>Note:</b> Quantity should indicate <b>share</b> amounts for stocks, mutual funds and bonds.</li> </ul>									
Quantity *	Security Description *				CUSIP/Symbol/Fund Code *				
Additional Information			<input type="checkbox"/> see attached *						
Information about Donations									
<b>NOTE:</b> Donations of securities are done on a best efforts basis. Where a donation is requested involving one or more external institutions, we can not guarantee the delivery of assets in a predetermined specified time resulting in possible market fluctuations.									
Donation/Transfer Authorization									
Primary Account Holder Signature *						Date *			
Joint Account Holder Signature *						Date *			

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