WATERLOO REGION Community Foundation

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

1. **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.
2. **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.
3. **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.
4. **Forward a copy of the completed form to Dan Robert at WRCF**.
5. **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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