



# 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](mailto: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.

**Waterloo Region  
Community Foundation**  
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