

# Alzheimer Society

## Gift of Publicly Traded Securities

**Step 1:** Prior to transferring securities to us, please fax or email this form to:

Christopher Mokler, Manager, Accounting - Alzheimer Society of Toronto  
Fax: 416-322-6656 Email: [cmokler@alzon.ca](mailto:cmokler@alzon.ca)

**Step 2:** Donor Information – Name of donor for charitable receiving purposes:

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Email: \_\_\_\_\_

Gifts of \$1,000 or more are acknowledged in our Annual Report.

Please indicate if you prefer to remain anonymous

**Step 3:** This letter will confirm my intention to donate the following securities to the Alzheimer Society without restriction and which can be sold at any time considered appropriate.

Name of Shares: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Authorization of donor: \_\_\_\_\_ Date: \_\_\_\_\_

**Step 4:** Your Broker/Delivering Custodian Information:

Name of firm: \_\_\_\_\_

Broker's name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Step 5:** To transfer securities, please advise your broker of the following

Alzheimer Society broker details:

Anwar Husain, Investment Advisor, BMO Nesbitt Burns  
22 St. Clair Ave East, Suite 1203  
Toronto, Ontario M4T 2S7  
416-485-4136  
[anwar.husain@nbpcd.com](mailto:anwar.husain@nbpcd.com)

Account # is 615-02538 10 and please quote our Dealer Rep Code as "9185 KQI".

Transfer information should include: CUID: NTD T and BBS FINS # T009

*Please be advised that the value of the donation receipt will be based on the closing price of the securities on the day that they are received into the Society's account in accordance with our policy and Canada Revenue Agency (CRA) regulations*