

GIFT OF PUBLICLY TRADED SECURITIES

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

Anne McPhee  
Director of Operations  
Phone: 416-277-4755  
Email: [amcphee@alz.to](mailto:amcphee@alz.to)

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

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

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

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

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

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 of Toronto without restriction and which can be sold at any time considered appropriate.

Name of shares: \_\_\_\_\_ # of shares: \_\_\_\_\_

Name of shares: \_\_\_\_\_ # of shares: \_\_\_\_\_

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

Please indicate area of designation for gift:

Area of greatest needs  Research  Programs and services  Special projects as discussed

**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 Toronto broker details:

Anwar Husain, Investment Advisor, BMO Nesbitt Burns  
22 St. Clair Ave East, Suite 1203, Toronto, Ontario M4T 2S7.  
Phone: 416-485-4136 Email: [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 and BBS FINS # T009 **regulations.**

*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 policy and Canada Revenue Agency regulations.*

**ALZHEIMER SOCIETY OF TORONTO**  
**1600 – 20 EGLINTON AVENUE WEST, TORONTO ON M4R 1K8**

TEL: (416) 332 6560 FAX: (416) 322 6656

[www.alz.to](http://www.alz.to)

CHARITABLE REGISTRATION NUMBER: 10670 5262 RR0001