

# 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 *		Postal Code *	
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 *			

**CONFIDENTIALITY:** This message transmitted by fax or mail is intended solely for the individual or entity to whom it is addressed. The information contained in this message is legally privileged and confidential. If you are not the intended recipient or the person responsible for delivering it to the intended recipient, you are hereby advised that you are strictly prohibited from reading, using, copying or disseminating the contents of this message. Please return this message to us immediately. Otherwise, delete this message immediately.