



**GIFT OF PUBLICLY TRADE SECURITIES
Notification of Securities Transfer**

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

Alexandra Hughes, Administrative Assistant
United Way Simcoe Muskoka
1110 Highway 26
Midhurst, ON L9X 1N6
Phone: 705-726-2301 Email: ahughes@uwsimcoemuskoka.ca

Step 2: Donor Information – for charitable receipt purposes:

Name: _____
Address: _____ City: _____
Province: _____ Postal Code: _____
Phone: _____ Email: _____

Step 3: This letter will confirm my intention to donate the following securities to the United Way Simcoe Muskoka without restriction and which can be sold at any time considered appropriate.

Name of shares: _____
Number of shares: _____
Authorization signature: _____

Step 4: Your Broker/Delivering Custodian Information:

Name of firm: _____
Advisor's Name: _____
Phone: _____ Email: _____

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

RBC Dominion Securities Inc.
Account # 541-29485-1-4
FINS # T002
DTC 5002
CUID DOMA
EUROCLEAR #90065
Dealer Number / Representative Code: 9190/HF8
Contact Name: Chantal McNeily, Investment and Wealth Advisor
Phone Number: 705-734-4409