

## **Gift of Publicly Traded Securities: Letter of Direction**

**This form is to be completed by the Donor's Financial Advisor**

**Upon completion of sections 1 through 4 of this document, please forward to the following parties:**

1. Securities Dealer/Custodian
2. GiveWise Donations Processing team at [donations@givewise.ca](mailto:donations@givewise.ca)

### **1. Donor Information [For Charitable Receiving Purposes]**

FIRST NAME	INITIAL	LAST NAME	
EMAIL ADDRESS		PHONE NUMBER	
ADDRESS	CITY	PROVINCE	POSTAL CODE

### **2. Securities / Delivering Custodian Information**

NAME OF SECURITIES FIRM		ADVISOR'S EMAIL	
CONTACT NAME (ADVISOR)		ADVISOR'S PHONE NUMBER	
SECURITIES DEALER/CUSTODIAN ADDRESS	CITY	PROV	POSTAL CODE
ACCOUNT NUMBER	CUID/DTC AND/OR FINS # (IF APPLICABLE)		

### 3. Securities To Transfer In Kind

SECURITY DESCRIPTION	QUANTITY	APPROX VALUE	FUND SYMBOL/CUSIP

\*\*NOTE: Tax receipt will be valued in accordance with the Canada Revenue Agency

### 4. Acknowledgment & Authorization

I acknowledge that there are substantial variations in transaction timelines for the transfer of securities, depending on the originating organization. The tax receipt date is the day securities are received by GiveWise Foundation Canada, who is not responsible for receipting for securities that are not received in time for a tax receipt to be issued in the same year the transaction was initiated. I understand that a cost recovery fee of \$50 per security will be deducted by GiveWise from the donation proceeds.

I confirm my intention to transfer asset listed above as a donation to GiveWise, into Giving

Fund # \_\_\_\_\_

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE (YYYY/MM/DD)

### 5. Deliver Securities to the Charitable Organization Listed Below:

<b>Name of Charity:</b>	GiveWise Foundation Canada
<b>Attention:</b>	Tammy Kyte 604.302.1760
<b>Brokerage House:</b>	BMO Investorline
<b>Brokerage Account #:</b>	239-13214
<b>Address of Brokerage:</b>	First Canadian Place 100 King St W Floor B1 Toronto, Ontario M5X 1H3
<b>CUID:</b>	NTDT
<b>Dealer Rep Code:</b>	9185
<b>DTC #:</b>	5043
<b>Euroclear:</b>	90098
<b>BMO Investorline Contact:</b>	1-888-776-6886