



# GIFTS OF PUBLICLY TRADED SECURITIES TO YMCA OF SOUTHWESTERN ONTARIO

Download and complete this form with the correct transfer information for your gift and instruct your broker to transfer your securities. In order to facilitate the transfer and ensure you receive your official tax receipt, please return a copy of the completed form to Christina Harley, VP Development at YMCA of Southwestern Ontario at christina.harley@swo.ymca.ca.

### Donor Information

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_ Alternative Contact Person: \_\_\_\_\_

### Description of Securities

This letter will confirm my intention to donate the following securities to the YMCA of Southwestern Ontario:

Security Description:	Quantity	Fund Code	CAN <input type="checkbox"/> US <input type="checkbox"/>
Security Description:	Quantity	Fund Code	CAN <input type="checkbox"/> US <input type="checkbox"/>

### Broker Information

Name of Firm: \_\_\_\_\_ FINS#: \_\_\_\_\_ Fax: \_\_\_\_\_  
Name of Broker: \_\_\_\_\_ Broker Email: \_\_\_\_\_ Phone: \_\_\_\_\_  
Account Name: \_\_\_\_\_ Client Account Number: \_\_\_\_\_

### Gift Designation

- Highest Needs of the YMCA of Southwestern Ontario
- Specific Designation: \_\_\_\_\_

### Donor Authorization:

*I understand that I will receive a charitable tax receipt from YMCA of Southwestern Ontario based on the closing price of the shares on the day the shares are received/transferred to the YMCA of Southwestern Ontario brokerage firm. In order to receive a charitable tax receipt for calendar year, the shares must be transferred to the YMCA of Southwestern Ontario account no later than December 24th, of the same calendar year. These securities have been transferred to YMCA of Southwestern Ontario without restriction.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### Recognition:

- You may recognize my name publicly
- I prefer that my gift remain anonymous

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

YMCA of Western Ontario/YMCA of Southwestern Ontario  
Account: # 641-45981-17 Broker CUID DOMA

**Adam Bain**, V.P and Investment Advisor 519-675-2022, adam.bain@rbc.com  
**Trina Emery**, Associate Advisor 519-675-2521, trina.emery@rbc.com  
Fax 519-675-2020 RBC Dominion Securities 148 Fullarton Street, 20th Floor London, ON N6A 5P3