



# CHARITABLE DONATION OF SECURITIES SHARE TRANSFER AUTHORIZATION FORM

Stratford Perth Community Foundation’s endowment is managed by the London Community Foundation. All share transfers will be processed by the London Community Foundation’s brokerage firm.

## HOW TO DONATE SECURITIES

- 1. Fill out this form.** Your broker/investment advisor can help you complete this form.
- 2. Forward the completed form to your broker/investment advisor** to initiate the electronic transfer of the securities (SPCF is not permitted to initiate the transfer on your behalf).  
  
If you self-manage your investments, contact Heidi Culliton at SPCF to guide you through the transfer process (contact information below).
- 3. Forward a copy of the completed form to Melissa Gauvin at BMO Nesbitt Burns** (contact information at left). BMO must receive a copy of the form directly from you or your advisor.
- 4. Forward a second copy of the completed form to Heidi Culliton, SPCF Executive Director.**
- 5. A tax receipt will be issued to you** for the closing price of the securities on the day they are received by BMO.

### Stratford Perth Community Foundation

PO Box 224  
Stratford ON N5A 6S9  
Tel: 519-271-1503

Charitable #: 88488 4305 RR0001

**Heidi Culliton**  
Executive Director  
[Heidi@spccf.ca](mailto:Heidi@spccf.ca)

Attn: .....  
Full Name of Your Broker (First, Last)

Please accept this form as authorization to transfer .....  
Number/Amount

shares of .....  
Name of Shares/Company

currently held by .....  
Your Brokerage Firm

from account .....  
Your Account Number

**Designation:**  
**London Community Foundation – Stratford Perth Community Foundation**

This donation of shares will be transferred through London Community Foundation’s brokerage firm, **BMO Nesbitt Burns**:

**Account #:** 440-2069811 / **FIN #:** T009 / **CUID #:** NTDT

**Contact Person:** Melissa Gauvin  
**Tel:** 519-646-2354 / **Fax:** 519-679-8848 / **Email:** [Melissa.Gauvin@nbpcd.com](mailto:Melissa.Gauvin@nbpcd.com)

.....  
Your Name - Name of Donor (first, last)

.....  
Address

.....  
City and Province Postal Code

.....  
Telephone Email

.....  
**Stratford Perth Community Foundation fund to receive the donation of securities**

.....  
Is the donation to be fully endowed? Or is a portion to be allocated to Flow-Through?  
(please indicate the dollar amount or percentage)

### Donor Authorization:

Donor Signature ..... Date .....