



# 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

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: Stratford Perth Community Foundation**

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

Account number: 440-2069811  
FIN number: T009  
CUID number: NTDT  
Contact name: **Ellen Rivers, Investment Representative**  
Email: [ellen.rivers@nbpcd.com](mailto:ellen.rivers@nbpcd.com)  
Telephone: 519-646-1131  
Fax: 519-679-8848

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

.....  
Address

.....  
City and Province Postal Code

.....  
Telephone Email address

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

### **Donor Authorization:**

.....  
Donor Signature Date

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 Ellen Rivers at BMO Nesbitt Burns (contact information at left). BMO must receive a copy directly from you or your advisor.
4. Forward a second copy of the completed form to Heidi Culliton, Executive Director at SPCF (contact information below).
5. Securities are sold immediately when received by BMO Nesbitt Burns. A donation receipt will be issued in the name of the donor for the proceeds amount from the sale of the securities.

**Stratford Perth Community Foundation**  
55 Lorne Avenue East, Unit 5  
Stratford ON N5A 6S4  
Tel: 519-271-1503  
Fax: 519-271-1504  
Charitable #: 88488 4305 RR0001

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