



GIFT OF SECURITIES

This form is to be completed by the donor. Please note, upon receipt by the custodian in negotiable form, the security(ies) will be valued at the close of trading for that date. A tax receipt will be issued to the donor for this amount. Leith Wheeler will provide written confirmation to the Community Foundation of Southeastern Alberta of receipt and value of the securities based on reconciliation with the custodian, National Bank Independent Network (NBIN Inc.) *Revised: October 2024*

Full name of Donor: _____

Complete Address: _____

Daytime Telephone: () _____ Cell #: () _____

Name of Custodian: _____

Name of custodian's firm: _____

Custodian's CUID Number: _____ Custodian's Phone #: () _____ Fax #: () _____

Name of Security(ies): _____

CUSIP / Property #: _____

Number of shares or face value of the bonds or coupons: _____

Description of securities (e.g. common, preferred, debentures, etc.): _____

Please discuss the purpose of your gift with the Community Foundation of Southeastern Alberta

PLEASE SUBMIT THIS FORM TO YOUR BROKER OR INVESTMENT REPRESENTATIVE AND SEND A COPY TO:

Chris Christie, Interim Executive Director
Community Foundation of Southeastern Alberta
#104, 430 – 6th Avenue SE, Medicine Hat, AB T1A 2S8
chris@cfsea.ca

Upon confirmation by the Community Foundation of the proposed transfer, the donor will notify the Community Foundation of the date of transfer.

Please transfer the securities to: NBIN Inc.
130 King Street West, Suite 3000
Toronto, Ontario M5X 1J9

Custody Investment Account: 6C42N4A for Canadian securities
6C42N4B for US securities

CUID Number for Electronic Transfer: NBCS
Service Coordinator: Ayo Otepolo, (Service Delivery Team Lead)
Ph: (416) 869-8703 ext: 07136 (c) 647-228-7802
Email: nbinwestsupport@nbc.ca

Signature of Donor

Name (please print)

Date