



## Donation of Publicly Traded Securities Form

Name of Donor (s): \_\_\_\_\_

Mailing Address of Donor(s): \_\_\_\_\_

\_\_\_\_\_

Name of Institution Transferring Stock: \_\_\_\_\_

Account Number at Delivering Institution: \_\_\_\_\_

Name and Symbol of the Securities: \_\_\_\_\_

Exchange where the Securities are Traded: \_\_\_\_\_

Number of Shares/Units & Approx Value: \_\_\_\_\_

Donation to be Used for: \_\_\_\_\_

### Process for Making a Donation of Securities by Electronic Transfer

1. Please instruct your broker to call Sarah Sackville at RBC Dominion Securities at (705) 743-0126 (toll free 1-800-429-9507).

2. Ask your broker to transfer your publicly traded securities to the United Way – Account number 361-07782-13 (CUID: DOMA DTC: 5002).

3. When this form is completed please fax to Sarah Sackville at 705-743-0126 and send a copy to Rhonda Gilchrist, Director, Administration & Finance [rgilchrist@uwpeterborough.ca](mailto:rgilchrist@uwpeterborough.ca)

The date of your donation will be the date the securities are deposited into our RBC Dominion Securities account. The securities will be valued using the price at the close of trading the previous day. This will be the amount used for the tax receipt.

\_\_\_\_\_  
Signature of Donor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Joint Donor

\_\_\_\_\_  
Date

Date Received: \_\_\_\_\_

Value of Gift \$ \_\_\_\_\_

Approved by: \_\_\_\_\_

Branch Manager, RBC Dominion Securities Inc.

For United Way Use Only:

Date Securities Received: \_\_\_\_\_ Value of Gift for Tax Receipt Purposes: \_\_\_\_\_

Broker Receipt # \_\_\_\_\_

Tax receipt issued to: \_\_\_\_\_

Amount of Receipt: \$ \_\_\_\_\_ Receipt Number # \_\_\_\_\_