

## Directions for Electronic Transfer of Publicly Traded Securities or Mutual Funds

### Donor Steps:

Transfer requests that do not contain the information requested herein or that are not faxed may result in delayed deliveries and issuance of tax receipts.

**Step 1.** Complete form with your investment advisor.

**Step 2.** Please email the completed and signed form to [giftsofsecurities@spca.bc.ca](mailto:giftsofsecurities@spca.bc.ca). This form is required for the issuing of an official receipt for tax purposes.

### DONOR INFORMATION

<b>Donor Name</b> <input type="checkbox"/> Mr. <input type="checkbox"/> Miss <input type="checkbox"/> Dr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Prof.	<b>First Name</b>	<b>Initial</b>	<b>Last Name</b>	
<b>Mailing Address</b>	<b>City</b>		<b>Province</b>	<b>Postal Code</b>
<b>Phone Number</b>	<b>Email Address</b>			

### PLEASE TRANSFER THE FOLLOWING SECURITIES/MUTUAL FUNDS

SECURITY DESCRIPTION	CAD	USD	NO. OF SHARES	CUSIP / ISIN
MUTUAL FUND DESCRIPTION	CAD	USD	NO. OF UNITS / DOLLAR AMOUNT	FUND CODE / FUND #

Donors Signature \_\_\_\_\_

Date \_\_\_\_\_

### DELIVERING INSTITUTION INFORMATION (ALL FIELDS REQUIRED)

<b>Delivering Institution Name</b>	<b>CUID (CDN Securities)</b>	<b>DTC (US Securities)</b>
<b>Account Name</b>	<b>Contact Name</b>	
<b>Account Number</b>	<b>Contact Phone Number/Email</b>	

### RECEIVING INSTITUTION INFORMATION

<b>BMO Nesbitt Burns</b> <b>CUID: NTD (Cdn Securities)   DTC: 5043 (US Securities)</b> <b>Dealer/Rep Code: 9185/U2M</b> <b>Mutual Fund Nominee Name: BMO Nesbitt Burns</b>	<b>Account No.</b> <b>81514576-14</b>  <b>BMO Contact:</b> Christina Lee 604.595.0122 or <a href="mailto:christina.lee@nbpcd.com">christina.lee@nbpcd.com</a>
---	---

**THANK YOU!**