

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. This form is required for the issuing of an official receipt for tax purposes, if applicable.

DONOR INFORMATION

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

PLEASE TRANSFER THE FOLLOWING SECURITIES/MUTUAL FUNDS

SECURITY DESCRIPTION	<input type="checkbox"/> CAD <input type="checkbox"/> USD	NO. OF SHARES	CUSIP / ISIN
MUTUAL FUND DESCRIPTION	<input type="checkbox"/> CAD <input type="checkbox"/> USD	NO. OF UNITS / DOLLAR AMOUNT	FUND CODE / FUND #

Donors Signature _____

Date _____

DELIVERING INSTITUTION INFORMATION (ALL FIELDS REQUIRED)

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

RECEIVING INSTITUTION INFORMATION

BMO Nesbitt Burns CUID: NTD (Cdn Securities) DTC: 5043 (US Securities) Dealer/Rep Code: 9185/U2M Mutual Fund Nominee Name: BMO Nesbitt Burns	Account No. 81514576-14 BMO Contact: Christina Lee 604.595.0122 or christina.lee@nbpcd.com
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THANK YOU!