

Gift of Securities Transfer Form



Donor Details

Name:

Address:

City:

Province:

Postal Code:

Phone Number:

Email:

Broker Details

Name:

Financial Institution:

Phone Number:

Email:

Gift Details

Number of Shares:

Name of Securities:

Approximate Amount:

Expected Date of Transfer:

Designation Details: **Powassan and Area Family Health Team**

Making a Gift

- 1) Complete this form.
- 2) Instruct your broker to transfer your securities to North Bay and Area Community Foundations brokerage account, by way of this form.
NBACF's broker: Assante Wealth Management, Name of Fund: North Bay and Area Community Foundation, Plan # 95877698NO, CUID #ASNA, Dealer # 9721.
- 3) Email or mail a copy of this completed form to:
kate.merritt@nbacf.ca OR
North Bay and Area Community Foundation
Attn: Kate Merritt-Dupelle
PO Box 22008 Fisher PO
North Bay, ON
P1B 2H0
- 4) A charitable tax receipt will be issued for the closing price of securities on the day of the transfer.

Donor Signature:

Date: