

Stocks & Securities Donation Form for Donors to the Education Foundation of Niagara



This form will provide the Education Foundation of Niagara with information necessary for issuing a charitable tax receipt and will ensure the Education Foundation of Niagara is aware of your intention to donate stocks/securities.

Donor Information

Name of Donor: _____

Address: _____

City: _____ Prov: _____ PC: _____

Telephone: _____ Cell: _____

E-mail: _____

I would like my gift dedicated *In Memory or In Honour of*: _____

Donor's Broker Information

Company Name: _____

Name of Broker: _____

Address: _____ City: _____ Prov: _____ PC: _____

Telephone: _____ E-mail: _____

Securities/Stocks to be donated

Name of Security/Stock: _____ # of Shares: _____

CUSIP No.: _____ Date of Transfer: _____

Description of Shares (e.g. common, preferred, mutual fund units, etc.) _____

Class of Shares (if applicable): _____

Fund where gift is to be designated: _____

State purpose of gift (outright use or endowment): _____

The stock will be valued for your charitable receipt at the closing price on the day it is received by the Education Foundation of Niagara's brokerage account.

Securities Donation Authorization from Donor to Broker

By this signature I hereby instruct my broker to effect the transfer to the Education Foundation's brokerage account.

Donor Signature: _____ Date: _____

Education Foundation of Niagara's Broker Information & contact details for your broker:

Name: RBC Dominion Securities Inc.

Address: 400-63 Church St., St. Catharines ON L2R 3C4

Account Name: Education Foundation of Niagara

Account Number: 571-36588-1-2-HE8

CUID#: DOMA

FINS #: T002

DTC#: 5002

Contact: Karen Charlesworth

Telephone: 905-988-5882

Fax: 905-988-5889

E-mail: karen.charlesworth@rbc.com

Please FAX to: 905-641-9521, mail or deliver this completed form to the Education Foundation of Niagara, attention Planned Giving AND submit a copy to your broker. Thank You.