



Registered charity number 889975223RR0001

## GIFT OF PUBLICLY TRADED SECURITIES – DONOR FORM

*To be completed by the donor/owner of the securities and presented to his/her Financial Institution.*

To initiate a donation of securities to Halton Learning Foundation (HLF), please complete this form and provide to your financial institution to execute your request.

**IMPORTANT: Please ensure that a copy of the completed form is provided to HLF so we can track your donation and issue a tax receipt. Please email copy to Marc Clare, [clarem@haltonlearningfoundation.ca](mailto:clarem@haltonlearningfoundation.ca) or mail to Halton Learning Foundation, 2050 Guelph Line, Burlington ON L7P 5A8.**

### A: INFORMATION ABOUT YOUR BROKER AND SECURITIES:

Broker's Name \_\_\_\_\_  
Financial Institution \_\_\_\_\_  
Donor's Account Number \_\_\_\_\_  
Broker's Telephone Number \_\_\_\_\_  
Broker's e-mail \_\_\_\_\_

### B: DONOR INFORMATION:

First Name, Initial, Last Name \_\_\_\_\_  
Address City Postal Code \_\_\_\_\_  
Phone Number \_\_\_\_\_  
Email Address \_\_\_\_\_

### C: ASSET DONATION DETAILS:

Securities Description \_\_\_\_\_  
Market Value OR Number of shares/units \_\_\_\_\_  
CUSIP/Fund information \_\_\_\_\_  
Receiving institution FIN 2002 \_\_\_\_\_

### INSTRUCTIONS FOR DELIVERY:

Name and Account number - **Halton Learning Foundation #538-12710-13**

#### Receiving Broker details:

**RBC Dominion Securities Inc.**  
**180 Wellington St. West, 12<sup>th</sup> Fl**  
**Toronto, Ontario**  
**M5J 0C2**

**CUID: DOMA**

**DTC: 5002**

**Dealer: 9190/GPM**

**Fax: 416-313-7493**

I/we hereby authorize the transfer of these securities to the **Halton Learning Foundation**. This gift of securities is irrevocable and I/we understand that to receive a charitable tax receipt for the current tax year, the securities must be received in the Foundation's account at the Foundation's brokerage firm on or by December 31 and that the Foundation is not responsible if the securities are not received in its account by that date.

Donor Signature

Donor Signature

DATE