



11 Bond Street, Suite 207
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 Charitable Registration # BN 11924 7328RR0001

www.niagarasymphony.com

Direction and Notification of Gift of Securities

The Niagara Symphony Orchestra, (*Niagara Symphony Association*) greatly appreciates your support through a donated gift of securities. Under current tax regulations, your donation of publicly traded securities (*stocks, bonds, mutual funds*), is exempt from capital gains tax only when you transfer the securities *in specie* or *in-kind* to a charity. For more information on CRA regulations visit: canada.ca

Donor Information

Name:
 Address:
 City: Prov: Postal Code:
 Phone:
 Email:

Donor's Broker Information

Company Name:
 Broker/Contact Name:
 Address:
 City: Prov: Postal Code:
 Phone: Ext #: Fax:
 Email:

Steps to donate

- 1) Complete this form for transferring, tracking and receipting
- 2) Give this form to your broker or investment firm to arrange the transfer of securities to the NSO investment account
- 3) Send a copy of this form to *our broker*. Your broker/agent can do this. See *Transfer Section*
- 4) Send a copy of this form or detailed notice *to us at the NSO*. Your broker/agent can also do this via mail to the address above or email:

john.mchenry@niagarasymphony.com

Securities to be transferred to Niagara Symphony Association (NSO)

Number of Shares: Name of Security: CUSIP Number:

Expected Date of Transfer:

Transfer Securities In-Kind to:

Niagara Symphony Association Investment Account # 581-28459-2-2
 RBC Dominion Securities RBC Wealth Management Partridge Wealth Management
 63 Church Street Suite 400 St. Catharines ON, L2R 3C4
 Contact: Debbie Warren-Senior Associate (P): 905-988-5703 (F): 905-988-5889 Email: debbie.warren@rbc.com
 FINS #T002 DTC #5002 CUID DOMA ERUOCLEAR #90065 Dealer Code 9190 Representative Code HRB

Authorization for transfer:

I, the undersigned, authorize the transfer of these securities to the Niagara Symphony Association (NSO). Permission to contact my broker to conclude this transaction is granted to the Niagara Symphony Association and its agent.

Donor Name: Donor Signature: Date:

Additional Notes or Instructions (*Donor listing, in honour or in memory of, etc.*):