

# Gifts of Publicly Listed Securities Share Transfer Form



Greater Victoria  
Greenbelt Society

## 1. DONOR INFORMATION

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Daytime Phone Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

## 2. DONOR'S ACCOUNT

Financial Institution: \_\_\_\_\_ Account Number: \_\_\_\_\_

Name of Financial Advisor: \_\_\_\_\_ Contact Phone Number: \_\_\_\_\_

## 3. DONATION

Name of Security: \_\_\_\_\_ Quantity: \_\_\_\_\_ CUSIP/ISN: \_\_\_\_\_

Name of Security: \_\_\_\_\_ Quantity: \_\_\_\_\_ CUSIP/ISN: \_\_\_\_\_

Allocation of Donation (optional): \_\_\_\_\_

I understand that I will receive a gift-in-kind tax receipt for these securities from Greater Victoria Greenbelt Society for the closing price on the date the securities are received in the charity's account. These securities have been donated to the Greater Victoria Greenbelt Society without restriction and can be sold by the charity at their discretion.

*Signature of Donor:* \_\_\_\_\_

*Date:* \_\_\_\_\_

## Greater Victoria Greenbelt Society

**Receiving Firm:** Raymond James Ltd.  
**Dealer/Rep #:** 9485/9340 **FINS:** T089 **DTC #:** 5076  
**CUID:** MSLW **EURO CLEAR #:** 91770  
**Account Number:** 1KF-8N0A-0  
**Name of Account:** Greater Victoria Greenbelt Society  
**Charitable Registration #:** 118946953RR0001

*A checklist for your reference:*

- Please call Greater Victoria Greenbelt Society **prior to initiating the transfer of securities**, to ensure that your gift is handled efficiently and tracked for issuance of a receipt for income tax purposes. Tel: 250-478-5858
- Notify your financial advisor of your intention to make a gift of securities.
- Give your financial advisor authorization to initiate the transfer on your behalf. This form, completed and signed, should be sufficient for authorization.
- Email or Fax a copy of this signed form to Christine Edwards at [christine.edwards@raymondjames.ca](mailto:christine.edwards@raymondjames.ca)  
Fax # 250-405-2499 Phone 250-405-2428**

**Thank you for your generous support of the Greater Victoria Greenbelt Society!**

The Greater Victoria Greenbelt Society / 499 Millstream Lake Rd. Victoria, BC V9B 6H5  
Tel: 250 478 5858 / [info@marylakevgs.com](mailto:info@marylakevgs.com) / [www.marylakeconnections.ca](http://www.marylakeconnections.ca)