



A Gift of Shares to the Ottawa Community Foundation

Charitable Registration No. 119227981RR0001

To provide a gift of shares to the Ottawa Community Foundation:

1. Send the completed form to your investment advisor or broker so they can initiate the transfer:

National Bank Independent Network, 130 King Street W., 30<sup>th</sup> Floor, Toronto, ON M5X 1J9

Canadian securities

Account No. 6C768ZA (FINS: T080) (CUID: NBCS)

US securities

Account No. 6C768ZB (DTC: 5008)

Mutual Funds

Dealer #9822; CUID: NBCS; Rep Code: A6WC

2. You must also send the completed form to [finance@ocf-fco.ca](mailto:finance@ocf-fco.ca) or by fax (613-236-1621) or regular mail. We can follow up with any questions with respect to the transfer of shares.
3. If you have any further questions, please contact **Robert Westgarth**, Director, Finance Operations at 236-1616 ext. 240 or [rwestgarth@ocf-fco.ca](mailto:rwestgarth@ocf-fco.ca).

Donor and share information:

Donor/Registered holder Name:

Address:

Email/Telephone

Investment Account #:

Shares

Name:

Number:

Approximate \$ Value\*

Investment Advisor:

Name:

Firm:

Email/Telephone:

Direction to gift Shares:

I hereby direct you to transfer the above named shares to the Ottawa Community Foundation. This gift is intended for the:

(Name of the Fund)

I would like this gift to be:

- ☐ Endowed (retained permanently as part of the fund's capital); at an amount or % \_\_\_\_\_ if partial endowment.
- ☐ Flowthrough (available for granting at any time); at an amount or % \_\_\_\_\_ if partial flowthrough.
- ☐ Term endowed
- ☐ Spend-down endowed

Signature of registered holder and donor\*\*

Date

\*A tax receipt will be issued for the donation amount. The donation amount is the value of the securities at the close of business on the day the securities are received in the Foundation's account.

\*\*If this form is sent from the donor's personal email address no signature is required.