



101-334 Donlands Ave. Toronto, ON M4J 3R9  
 1-800-387-8146 Fax: 416-465-6367  
 www.linkcharity.ca info@linkcharity.ca

**DIRECT TRANSFER OF STOCK OR MUTUAL FUNDS**

**Instructions:**

1. Send the original copy of the transfer form to your broker.
2. Send a copy to Link Charity so we know who to receipt. Most brokers will not do this.
3. A sample Letter of Direction is available on the Securities section of [www.linkcharity.ca](http://www.linkcharity.ca). Please send it to Link Charity only.
4. Gifts received will be sold in accordance with the donor's instructions and receipted according to Link Charity Canada Inc.'s receipting policy. For information on this policy, please contact Link Charity.
5. Link Charity Canada Inc. charges a small fee to recover costs incurred as a result of the transfer and sale. From the gross proceeds of the sale, Link Charity deducts any selling commissions (charged by the receiving brokerage) as well as a Link Charity cheque fee of \$25 for the first beneficiary of a transaction and \$10 for each additional beneficiary.

Send me a charitable receipt and T5 slip for any dividends received over \$50. I will provide my SIN at year-end if necessary. (If this box is not checked you will receive no receipt, but the funds will be credited in your account for future disbursements)

**I/We hereby AUTHORIZE:**

|                    |       |               |              |
|--------------------|-------|---------------|--------------|
| Donor's Brokerage: |       | Contact Name: |              |
| Address:           | City: | Province:     | Postal Code: |
| Phone:             | Fax:  | Email:        |              |

To Transfer from my/our Account Number: \_\_\_\_\_ the following shares in-kind:

| Quantity: | Name of Security: | Symbol, if known: |
|-----------|-------------------|-------------------|
|           |                   |                   |
|           |                   |                   |
|           |                   |                   |
|           |                   |                   |

To the following account in the name of Link Charity Canada Inc.:

Brokerage: \_\_\_\_\_ CUID: \_\_\_\_\_ Contact: \_\_\_\_\_

Account Name: \_\_\_\_\_ DTC#: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Account Number: \_\_\_\_\_

**Please process this transfer immediately. This transfer is a charitable donation.**

Donor(s) information:

|                            |     |                |            |             |
|----------------------------|-----|----------------|------------|-------------|
| Family or Corporation Name |     | Middle Initial | Given Name |             |
| Address                    |     | City           | Province   | Postal Code |
| Phone                      | Fax |                | E-mail     |             |

Signatures (Brokerage will likely require a bank guarantee stamp):

\_\_\_\_\_  
 Donor Co-Donor Date

Please select one of the following brokerage accounts:

We try to match our brokerage with the donor's (when possible), e.g. BMO to BMO. That way, if anything goes wrong, it's easier for the one brokerage to correct.

## **STOCKS**

| <b>Brokerage</b>                      | <b>Account Number</b> | <b>CUID</b> | <b>DTC#:</b> |
|---------------------------------------|-----------------------|-------------|--------------|
| BMO InvestorLine                      | 210-73980-22          | NTDT        | 5043         |
| CIBC Investor's Edge Investment       | 571-42211-23          | WGDB        | 5030         |
| Scotia iTrade                         | 555-38469-23          | SCOT        | 5011         |
| TD Direct Investing (Canadian stocks) | 092867A               | GIST        | 5036         |
| TD Direct Investing (U.S. stocks)     | 092867B               | GIST        | 5036         |

## **MUTUAL FUNDS**

Please ensure that only mutual funds go to our Scotia Wealth account.

If stocks are sent there, the commission will likely be \$175 (instead of \$10 at a discount broker).

| <b>Brokerage</b>         | <b>Account Number</b> | <b>CUID</b> | <b>DTC#:</b> |
|--------------------------|-----------------------|-------------|--------------|
| Scotia Wealth Management | 407-88652-29          | SCOT        | 5011         |



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**DISTRIBUTION OF PROCEEDS LETTER OF DIRECTION**

I am transferring the following securities to Link Charity Canada Inc.:

| <i>Name of Security/Securities</i>      |  |
|---|--|
| <b>Please sell/redeem at:</b>           | <b>Please sell by the following date:</b>  |
| A. Current price upon noticing arrival. | Securities will be sold immediately.   |
| B. Best market price.                   | Within one business week of transfer-in.<br>Within two business week of transfer-in.<br>By the following date: _____ |
| C. A minimum price of \$ _____          | By the following date: _____   |

**Link Charity, please donate the proceeds to the charities in the amounts/ percentages listed below:**  
 (if giving dollar amounts, please designate one charity to receive "the balance")

| Amount (\$ or %) | Charity Name and Address | Designation or Restriction (if any) | Contact Person (if any) attention to | Anonymous (Y/N) |
|------------------|--------------------------|-------------------------------------|--------------------------------------|-----------------|
|                  |                          |                                     |                                      |                 |
|                  |                          |                                     |                                      |                 |
|                  |                          |                                     |                                      |                 |

If more charities, please attach another page with a full listing of amounts/percentages

Balance: \_\_\_\_\_

**Applicant:**

|                            |          |                |            |
|----------------------------|----------|----------------|------------|
| Family or Corporation Name |          | Middle Initial | Given Name |
| Address                    |          |                |            |
| City                       | Province | Postal Code    |            |
| Phone                      | Fax      | E-mail         |            |

Signature(s):

\_\_\_\_\_

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

This page should be sent to Link Charity only – do not send it to your brokerage.

\*Link Charity's fee is \$25 for the first charitable beneficiary and \$10 for each additional beneficiary of the same transaction

Registration No: 88804 7826 RR0001