# **nscc** Foundation

# Gift of Securities Transfer Form

# Thank you for supporting the NSCC Foundation with a gift of securities.

Donating gifts of publicly traded securities is an easy and tax-smart way to support the NSCC Foundation.

Your Informati	ion
Name	
Mailing Address	
City	Province Postal Code
Email	Phone
Your Broker In	formation
Name	
Financial Institution	
Phone	Fax
Email	
Securities to b	e Transferred
☐ I hereby give	permission to transfer the following securities to NSCC Foundation:
	□ Common shares of □ Preferred shares of
# of Shares	name of security
# of Shares	<ul> <li>☐ Common shares of</li> <li>☐ Preferred shares of</li> <li>name of security</li> </ul>
CU	SIP# Account# FINS#
Transfer Secui	rities In Kind to NSCC Foundation Brokerage Account:
RBC PH&N Investment Counsel 180 Wellington Street West, 12 <sup>th</sup> Floor, Account Transfer Department Toronto, ON, M5J 0C2	
Account: 46317	7697 1-0 CUID: DOMA DTC: 5002 Dealer: 9190 / REP# 1RG
Authorization	
	is transfer as a charitable donation to the NSCC Foundation. I agree that the NSCC Foundation, or its agent, may contact my broker ncluding this transaction.
	Signature of Donor Date

### **NSCC** Foundation

### Gift of Securities Transfer Form

#### **Instructions**

#### 1) Complete this form.

In order for stocks to be legally transferred and accepted by NSCC Foundation and our brokerage firm, a completed and signed copy of this form must be forwarded to your broker and to our broker.

#### 2) Give the form to your broker.

Your broker or investment advisor will initiate the security transfer from your brokerage account to the NSCC Foundation's brokerage account.

#### 3) Forward a copy of the completed form to <u>our</u> broker.

**RBC PH&N Investment Counsel** 

C/o Susanna Arcangel, Portfolio Management Assistant

RBC Phillips, Hager & North Investment Counsel Inc.

Royal Bank Plaza, 200 Bay St, South Tower, 17th Floor

Toronto, ON, M5J 2J5

Email: susanna.arcangel@rbc.com

Phone: 416-956-0937 (toll-free) 1-800-567-0006

Fax: 416-956-5060

#### 4) Send a copy of the form to NSCC Foundation.

Susan Pike, CPA, CGA,

Manager, Finance

NSCC Foundation

5685 Leeds St., PO Box 1153

Halifax, NS, B3K 2T3

Email: Susan.Pike@nscc.ca

Phone: 902-402-3631 Fax: 902-491-4828

\*For charitable receipt purposes, the value of the gift receipt will be determined by the fair market value of securities less any advantage or benefit received based on closing prices on the day the securities are received by NSCC broker; RBC PH&N Investment Counsel. The NSCC Foundation's practice is to sell publicly listed securities on the same day as received or as soon as reasonably possible, with proceeds deposited to the NSCC Foundations brokerage account. To ensure an income tax receipt is issued for the current calendar year, all paperwork must be received by December 15<sup>th</sup>.

The NSCC Foundation encourages donors to seek advice from their financial advisor when making a donation of securities.

#### **Questions? Contact Us!**

NSCC Foundation 902-491-2181 Charitable Registration Number 5685 Leeds St., PO Box 1153 1-866-745-7919 (toll-free) 887210318RR0001 Halifax, NS, B3K 2T3 foundation@nscc.ca www.nscc.ca/foundation