

Charitable Donation Of Securities In Kind

RAYMOND JAMES®

Raymond James Ltd. is a
Member of CIPF & IIROC

IA #

Account #

Branch

Donor Information

Name

Address

City

Province

Postal Code

Phone Number

Donor's Brokerage Information

Financial Institution Name

Contact Name

Donor's Account Number:

Phone Number

E-mail

CUID:

DTC #:

Securities To Be Transferred

1. Name of Security:

Quantity

CUSIP/ISIN:

2. Name of Security:

Quantity

CUSIP/ISIN:

Charitable Organization & Brokerage Information

Registered Charity

Charity Registration #

Charity E-mail

Charity Broker A/C #

Name of Receiving Firm

CUID:

DTC #:

Phone Number

Broker Contact Name

Broker Contact E-mail

I, _____, accept the donation of the above referenced securities on behalf of the above noted Charitable Organization.

Authorized Signature

Donor Authorization:

I hereby give authority to my brokerage firm to deliver the above noted securities without restriction as a charitable donation as instructed on this form.

Signature of Donor

Signature of Donor

Date (mm/dd/yyyy)

To contact Raymond James please
direct any questions to:
transfersdonations@raymondjames.ca

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