

Charitable Donation of Securities in Kind

*Mandatory Fields		Donor / Transferor Information			
Primary Account Holder – Last Name*	First Name*	Telephone			
		()			
Joint Account Holder – Last Name*	First Name*	Telephone			
		()			
Street Address	City	Province	Country	Postal Code	
Financial Institution Contact*	Telephone *	Email			
	()				
Financial Institution Name*	Account No.*	CUID			
Charitable Organization / Transferee Information					
Name of Charitable Organization / Transferee*					
Street Address*	City*	Province*	Country*	Postal Code*	
Charity Contact*	Telephone*	Email			
	()				
Financial Institution Contact*	Telephone*	Email			
	()				
Financial Institution*	Account No.*	CUID			
Additional Settlement Instructions (as required)		☐ see attached*			
Request Details					
- Please accept this form as authorization to gift/transfer the following securities / cash held in my/our account to the transferee account indicated above. - Note: Quantity should indicate share amounts for stocks, mutual funds and bonds					
Quantity*	Security Description*	CUSIP/Symbol/Fund Code*			
Additional Information		☐ see attached*			
Information about Donations					
Note: Donations of securities are done on a best-efforts basis. Where a donation is requested involving one or more external institutions, we can not guarantee the delivery of assets in a predetermined specified time resulting in possible market fluctuations.					
Donation / Transfer Authorization					
Primary Account Holder Signature*					Date*
Joint Account Holder Signature*					Date*

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**CI Financial Corp. Privacy Office
Canadian**

Subsequent Collection Form Standard Privacy Notice

CI Investment Services Inc. ("CIIS", "we", "our", "us") requires personal information to administer and provide services associated with your account ("Account Services"). We use the personal information collected on this form to provide the products and services you have requested, improve our products and services, and fulfill our legal and regulatory obligations. Additional privacy terms apply to use of our online services and certain other services. We are not responsible for Third Party Providers such as your financial advisor and their dealership, who process personal information in accordance with their own terms. We share your personal information with CI Financial company affiliates and their subsidiaries where necessary to administer and service your account. You have the right to request access to or correction of, or withdraw your consent to the processing of, your personal information. For more information, including with respect to our use of service providers outside of Canada or your province of residence, please contact our Privacy Officer or see the CIIS's Privacy Policy at <https://www.cifinancial.com/ci-is/ca/en/privacy.html>.