

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)						<input type="checkbox"/> see attached*					
Request Details											
<ul style="list-style-type: none"> 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						<input type="checkbox"/> see attached*					
Information about Donations											
<p>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.</p>											
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>.