

Three easy steps... to make a stock donation that will change lives in your community

Step 1: Please complete all sections of the securities transfer form attached.

For privacy reasons, your broker cannot disclose your name to us, so please complete the *Donor Information* section, including your daytime phone number with area code. Your advisor/broker will provide the CUSIP # which acts like a transaction number in case the transfer needs to be tracked.

Step 2: Please notify SHARE Family and Community Services for processing.

Fax a copy of the completed transfer form to SHARE.

This step is important because securities are transferred into our account without your name. We value every gift and want to provide you with an accurate tax receipt and appropriate recognition to honour your donation. Therefore, it is important for us to receive your name and address details.

Fax #: 604.540.2290

Contact info: Valerie Hutton, Director of Fund Development
200-25 King Edward St., Coquitlam, BC
Ph: 604.529.5119

Please note: Stock-trading information should not be communicated electronically and therefore should not be submitted through email or left on voice mail.

Step 3: Fax or send the completed transfer form to your broker or investment advisor.

Your broker or investment advisor is responsible for initiating the transfer.

Additional Information: Shares/stocks are considered legally transferred only when our custodial agent confirms delivery. Your receipt will be valued based on the closing price on the day when the shares are legally transferred to SHARE's account at our custodial agent _____

SHARE Family and Community Service's policy for the sale of donated securities is to sell the shares as soon as possible after they have been received.

Securities Transfer Form

From Donor to Broker

Please fax a copy of the completed form **before** proceeding with your securities transfer to:

**SHARE Family
and Community
Services**

Fax: 604.540.2290

If you have any questions regarding this form, or your donation, please contact:

**Valerie Hutton
Director of Fund
Development
valerie.hutton@sharesociety.ca
604.529.5119**

**CRA Business #:
118875798 RR0001**

Donor Information (required for tax receipting purposes)

The stock will be valued at the closing price on the date it is received in the SHARE Family and Community Services brokerage account.

Name _____

Address _____

City _____ Prov. _____ PC _____

Ph: () _____ Cell: () _____

Email _____

Broker Information

Company Name _____

Contact Name _____

Ph: () _____

Email _____

Transfer securities from:

Account #: _____

Securities to be donated:

Security Name	# of units shares	CUSIP #/symbol
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Security Name	# of units/Shares	CUSIP# / symbol
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I authorize SHARE Family and Community, or its agent, to contact my broker for the purposes of concluding this transaction.

Signature _____

Transfer securities to:

Date _____

CUID: DOMA DTC#:

EUROCLEAR#:

Acct# _____

Please consult your legal and financial advisors before finalizing your decision to proceed.

*Thank you for considering how you can leave a legacy through
SHARE Family and Community Services.*

For more information please call SHARE's administration office at 604.540.9161 or contact our Director of Fund Development, Valerie Hutton - valerie.hutton@sharesociety.ca.

*This material provides general information and is not intended to constitute or replace specific professional advice.
Donors considering a legacy gift should speak to an advisor with appropriate tax and other expertise to implement a strategy that achieves their objectives.*