

Charitable Donation of Securities Share Transfer Authorization Form



Looking Forward...Giving Back!

Attention:
Full Name of Your Broker

Please accept this form as authorization to transfer
Number/Amount

shares of
Name of Shares/Company

currently held by
Your Brokerage Firm

from account
Your Account Number

This donation of securities will be transferred through Oxford Community Foundation's brokerage firm, **BMO Nesbitt Burns**:

Account # 440-2069811 / FIN # T009 / CUID # NTDT

Contacts before January 3, 2023: Stephanie McNally & Brenda Waugh
Tel: 519.646.2353 / Fax 519.679.8848 /
Email: Stephanie.McNally@nbpcd.com & Brenda.Waugh@nbpcd.com

Contacts after January 3, 2023: Iryna Accorsi
Tel: 519.646.2354 / Fax 519.679.8848 / Email: iryna.accorsi@nbpcd.com

.....
Your name

.....
Address

.....
City and province Postal code

.....
Telephone Email

.....
Oxford Community Foundation fund to receive donation of securities

.....
Is the donation to be fully endowed? Or is a portion to be allocated to Flow-Through? (Please indicate the dollar amount or percentage)

Donor Authorization:

.....
Signature Date

How to Donate Securities

1. **Fill out this form.** Note: we're comfortable accepting a form with an e-signature, as long as your broker/investment advisor accepts this format as well.

2. **Forward the completed form to your broker/investment advisor** to initiate the electronic transfer of the securities (OCF cannot initiate the transfer on your behalf).

If you self-manage your investments, contact Louise Wardrop at OCF to guide you through the transfer process (contact info below).

3. **Forward a copy of the completed form to Stephanie & Brenda at BMO Nesbitt Burns** (contact info at left). BMO must receive a copy directly from you or your advisor.

4. Forward a copy of the completed form to Louise Wardrop at OCF (contact info below).

5. A donation receipt will be issued to you for the closing price of the securities on the day they are received by BMO Nesbitt Burns.

Oxford Community Foundation

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Tel. 226-667-6404

www.oxfordcommunityfoundation.org
CRA # 89481 8103 RR 0001

Louise Wardrop

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