

# 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 # NTD

Contact person: Iryna Accorsi  
Tel: 519.646.2354 / Email: [iryna.accorsi@nbpcd.com](mailto:iryna.accorsi@nbpcd.com)

.....  
Your name

.....  
Address

.....  
City and province Postal code

.....  
Telephone Email

.....  
Oxford Community Foundation Name of Fund

.....  
Please add any special gift instructions (or contact Louise Wardrop at OCF)

## 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 Iryna Accorsi 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 tax 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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