

Gifts of Publicly Listed Securities Share Transfer Form

Donor

Name: _____

Address: _____

City, Province: _____ Postal Code: _____

Daytime Phone Number: _____ E-mail: _____

Donor's Account

Financial Institution: _____ Account Number: _____

Name of Financial Advisor: _____ Contact Phone Number: _____

Donation

Name of Security: _____ Quantity: _____ CUSIP/ISN: _____

Name of Security: _____ Quantity: _____ CUSIP/ISN: _____

Allocation of Donation (optional): _____

I understand that I will receive a donation-in-kind tax receipt for these securities from Islands Trust Conservancy. These securities have been donated to Islands Trust Conservancy without restriction and can be sold by them at their discretion.

Signature of Donor: _____

Date: _____

Islands Trust Conservancy

Receiving Firm: **IA PRIVATE WEALTH INC., ACCOUNT TRANSFERS DEPARTMENT**
26 WELLINGTON STREET EAST, SUITE 600
TORONTO, ONTARIO, M5E 1S2
FAX: 1-833-253-3764 **EMAIL:** accounttransfers@iagto.ca
DEALER/REP: 7923/SBW1 **FINS:** T080 **DTC #:** 5008 **CUID:** NBCS **CLEARSTREAM:** 37220

Account Number: 37B8HGA

Name of Account: ISLANDS TRUST CONSERVANCY

Qualified Donee: Business #122013576 RT0001. The Islands Trust Conservancy is a Crown agent and therefore considered a Qualified Donee under section 149.1 (1) of the *Income Tax Act*.

A checklist for your reference:

- ☐ **Prior to initiating the transfer of securities**, please contact the Islands Trust Conservancy, to ensure that your gift is handled smoothly and efficiently. **See below for contact information.**
- ☐ Notify your financial advisor of your intention to make a gift of securities.
- ☐ Give your financial advisor authorization to initiate the transfer on your behalf. This form, completed and signed, should be sufficient for authorization, or your advisor may be required to use a form provided by their firm.

Thank you for your generous support of Islands Trust Conservancy!

Islands Trust Conservancy
200 – 1627 Fort Street, Victoria, BC V8R 1H8

Phone: (250) 405-5191
Email: itcmail@islandstrust.bc.ca

Freedom of Information

Personal information contained on this donation form is collected under the authority of the Islands Trust Act Section 42 (2) (a), and is subject to the Freedom of Information and Protection of Privacy Act. The personal information will be used for purposes associated with the Islands Trust Conservancy's Strategic Charitable Giving Program. Enquiries about the collection or use of information in this form can be directed to the Islands Trust Conservancy Manager at 250-405-5191.