



Donation of Publicly Traded Securities

Process for Making a Donation of Securities by Electronic Transfer

Thank you for considering a donation to Niagara College.

1. Prior to initiating your gift transfer, please complete this form and fax or email it to:
Foundation & Alumni Relations, Niagara College
Fax: 905.988.4323
Wendy Dueck, MA, CFRE, Director of Development – Tel. 905.641.2252, ext. 7569
email: wdueck@niagaracollege.ca
2. For tracking purposes, please instruct your Investment Advisor to contact:
Simone Taddeo, TD Wealth Private Client Group – Fax: 905-331-6959, email: simone.taddeo@td.com
3. Have your Investment Advisor prepare and process a signed Letter of Direction to transfer securities.
Pertinent receiving account information:
Niagara College – Unrestricted Fund account MM5974
CUID: COMO **Custodian Name:** CIBC Mellon
Custodian Account: TDQF1100002
Reference Account: PIC Account Number: Niagara College of Applied Arts and Technology MM5974
Note: Please send a copy of the Letter of Authorization or In Kind Charitable Donation Transfer form to TD Waterhouse attention Simone Taddeo.
4. A charitable receipt will be issued for the value of the securities at the close of the business day on which they are vested with Niagara College - Charitable Registration # 11905 7180 RR001
5. Please discuss estimated timing of transfer with your Investment Advisor, as this will vary depending on the delivering institution and time of year.

Donor Information:

Name for charitable receipting purposes: _____

Full address: _____

Broker/Agent Information:

Dealer/Institution firm name: _____

Broker/Agent name _____ Tel. # _____

Market Security Information:

Name & Market Symbol: _____

Class (if any) _____ Type (common, preferred, mutual fund, etc.) _____

Number (volume) of shares/units: _____ Estimated market value \$ _____

Signature of Donor

Date

Revised
August 2013