

Donation of Publicly Traded Securities

Process for making an in-kind 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 email or fax it to:
Development & Alumni Relations, Niagara College
Gord Arbeau, Vice President, Advancement
Email: garbeau@niagaracollege.ca Fax: 905.988.4323 Phone: 905-641-2252 ext. 4400
2. For tracking purposes, please instruct your Investment Advisor to contact (*prior to delivering the donation*):
Robert Laplante at **Scotia Trust**: T: 514.499.4766 F: 514.499.5575 Email: robert.laplante@scotiapatrimoine.com
Heidi Rodier at **Letko Brosseau**: T: 514-499-1200 ext 106 F: 514-499-0361 Email: heidi.rodier@lba.ca.
3. Have your Investment Advisor prepare and process a signed Letter of Direction to transfer securities. Pertinent receiving account information:
Account Name: NIAGARA COLLEGE OF APPLIED ARTS AND TECHNOLOGY
Custodian Name: SCOTIATRUST
Custodian CAD Account: 78055254-12 CAD, CUID BNSC (for Cad stocks)
Custodian USD Account: 78055254-12 USD, DTC 4816, Agent ID 53440, Inst ID 53440 (for US stocks)
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: _____

Donor Full address: _____

Donor account reference at delivering institution: _____

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
May 2023