

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 & Donor Relations, Niagara College
Kevin Jong, Manager, Development and Donor Relations
Email: kjong@niagaracollege.ca Phone: 905-641-2252 ext. 7551 Cell: 289-687-5726
2. For tracking purposes, please instruct your Investment Advisor to contact (*prior to delivering the donation*): Ephraim Badoles at **Scotia Trust**: T: 514.499.0442 F: 514.499.5575 Email: ephraim.badoles@scotiawealth.com
Carmen Solomon at **Letko Brosseau**: T: 514-499-1200 ext. 110 F: 514-499-0361 Email: carmen.solomon@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
December 2024