

## **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](mailto: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](mailto:ephraim.badoles@scotiawealth.com)  
Carmen Solomon at **Letko Brosseau**: T: 514-499-1200 ext 116 F: 514-499-0361 Email: [carmen.solomon@lba.ca](mailto: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