



## Gift of Publicly Traded Securities Transfer Form

Charitable Registration Number 1318 15763 RR0001

In order to ensure prompt and accurate receipting of your donation, prior to transferring securities to our account, please email this form to Evergreen attn: **Kendall Schwertfeger** at [kschwertfeger@evergreen.ca](mailto:kschwertfeger@evergreen.ca)

### Follow 4 easy steps:

1. Download and complete all sections of this form. In order to facilitate the transfer and facilitate your tax receipt, please return a copy of the completed form to Evergreen at the email above.
2. Please forward a copy of the completed form to your Broker.
3. Please confirm with Evergreen that the transfer has been completed. Unexpected transfers make it difficult for us to issue an appropriate tax receipt.
4. The Value of the donation receipt will be based on the closing price of the security, on the day that the securities are received In Evergreen’s account, in accordance with our Board and Donation Policies.

### Information about your Broker and Securities:

Broker’s Name:	_____	Financial Institution:	_____
Broker’s Phone Number:	_____	Broker’s Email:	_____

I, \_\_\_\_\_, hereby give authority to deliver free the following securities to RBC Direct Investing (FINS T002, DTC 5002, CUID-DOMA) and to credit Evergreen account **#66539384-12**

Securities Description: \_\_\_\_\_

CUSIP Number: \_\_\_\_\_

Number of shares/units to transfer: \_\_\_\_\_

Signature (required): \_\_\_\_\_ Date: \_\_\_\_\_



**Donor Information:**

Name(s):

---

Account No.:

---

Address:

---

Email:

---

Phone Number:

---

If you have questions about the transfer process, or want to ask about supporting Evergreen in other ways, such as leaving a planned gift in your will, please get in touch with: **Andrew Stokes** [astokes@evergreen.ca](mailto:astokes@evergreen.ca)  
T: 289-815-5450, Evergreen, 550 Bayview Ave, Suite 300, Toronto, ON M4W 3X8.

