

Gift of Securities Transfer Form

Thank you for considering a gift of securities to **Evergreen**. It is a simple process and a wonderful way to support Evergreen. We are so grateful for your support!

Instructions:

1. Download and complete **all** sections.
2. To ensure prompt and accurate receipting of your donation, a completed and signed copy of this form must be forwarded to your broker **and** to Evergreen: **Kendall Schwertfeger** at donate@evergreen.ca.
3. Please confirm with Evergreen (donate@evergreen.ca) that the transfer has been completed. Unexpected transfers make it difficult for us to issue an appropriate tax receipt.

Eligibility of a tax receipt for the current year requires that securities must be in Evergreen's brokerage account by 5PM on December 31st of that year. We recommend that you submit your paperwork by December 15th.

Donated securities are sold upon receipt. The value of your tax 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 applicable Canada Revenue Agency guidelines.

Broker information:

Name: _____ Financial Institution: _____

Email: _____ Telephone: _____

Donor information (for tax receipt purposes):

Name(s): _____

Address: _____ City: _____ Prov: _____ Postal Code: _____

Email: _____ Telephone: _____

Donor Signature (**required**): _____ Date: _____

Description of your securities to be donated:

☐ I hereby give permission to transfer the following securities to Evergreen

Name of Security: _____ Number of Shares: _____

CUSIP#: _____ Account#: _____ FINS#: _____



To transfer securities, please advise your broker of the following details:

Transfer to:	FINS	DTC #	CUID	Dealer #	Account #
RBC Direct Investing	T002	5002	DOMA	9190	66539384-12

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 us: donate@evergreen.ca or 289-904-2051.

Evergreen

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Evergreen Charitable Number: 1318 15763 RR0001