



# **Gift of Securities**

## **Notification of Securities Transfer Form**

### **The Process**

1. Complete the Notification of Securities Transfer form and send it by e-mail to [plannedgiving@unitedway.ca](mailto:plannedgiving@unitedway.ca) or fax to 613-236-3087 to the attention of Serena Trentini. Upon completing this form, you will receive the Charitable Donation of Securities in Kind form to provide to your broker.
2. Instruct your broker to transfer your securities to United Way Centraide Canada's (UWCC) brokerage account using the Charitable Donation of Securities in Kind form. Once it is complete, please share a copy of this document with UWCC.
3. UWCC aims to sell securities on the same day they are received, or by the following business day.
4. Eligibility of a tax receipt for the current year requires that securities must be in UWCC's brokerage account by 5 PM on December 31<sup>st</sup> of that year.

**Thank you for making a gift of securities to United Way Centraide Canada!**



## Gift of Securities Notification of Securities Transfer Form

Please help us handle and acknowledge your gift appropriately by e-mailing or faxing this form to:

Attention: Serena Trentini, SVP Brand & Philanthropy  
[plannedgiving@unitedway.ca](mailto:plannedgiving@unitedway.ca) or 613-236-3087

In order to complete your donation, please contact your broker and arrange the share transfer using the Charitable Donations of Securities in Kind form provided to you by UWCC.

### Donor Details

Donor Name

Address

Phone/Fax

Email

My leadership gift (\$1,200 or more) may be publicly recognized by UWCC. Yes ☐ No ☐

Donor signature

Date

### Gift Details

Description of gift

Expected date of gift