



Gifts of Publicly Traded Securities – Share Transfers

Please notify the Bookkeeper at First Unitarian Congregation of Toronto (hereafter “First Unitarian”) BEFORE you start the share transfer. This will ensure your transaction is handled smoothly and efficiently.

In order to donate securities as a gift-in-kind:

1. Inform our Bookkeeper, Daniel Grzymisch, at First Unitarian at (416) 924-9654 ext. 2240.
2. Complete the form below and bring it or mail to First Unitarian; also provide a copy to Eleanor Martin at Scotia McLeod (address below).
3. Instruct your broker to initiate share transfer to First Unitarian’s account:

First Unitarian Congregation of Toronto Operating Account
 Acct. #439-57692 - DTC #5011
 ScotiaMcLeod, 40 King St. W., Suite 1101
 P.O. Box 115, Scotia Plaza
 Toronto, Ontario M5H 3Y2 Attn.: Eleanor Martin

Name of Donor:

Donor’s Address:

Daytime phone:

Donor’s Broker or similar contact person:

Firm Name:

DTC Transfer #:

Firm Address:

Broker’s Phone:

Name of Security:

Symbol:

Number of Shares Transferred:

Approximate Value of Each Share:

Approximate Total Amount of Donation:

Date of Transfer to First Unitarian’s Account:

I understand that I will receive a Gift-in-Kind tax receipt from First Unitarian for the closing price based on the date that the shares are received into First Unitarian’s account. These securities have been donated to First Unitarian without restriction and can be sold or held at First Unitarian’s sole discretion.

Signature of Donor:

Date: