



**United Way**  
Lower Mainland  
Change starts here.

## Gift of Publicly Listed Securities to United Way of the Lower Mainland Share Transfer Form

**To be completed by Donor:**

Name of Donor: \_\_\_\_\_ Daytime Telephone: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_

Donor's Workplace (if applicable): \_\_\_\_\_

Name of Donor's Broker: \_\_\_\_\_ Your Broker's Telephone: \_\_\_\_\_

Broker's Firm Name: \_\_\_\_\_

Name of Account and Account Number: \_\_\_\_\_

Name of Security: \_\_\_\_\_ # of Shares Transferred: \_\_\_\_\_

Approx. Value of Each Share: \_\_\_\_\_ Approx. Total Amount of Donation: \_\_\_\_\_

Date of Transfer to UW Account: \_\_\_\_\_

**Receiving Firm of the Securities:**

**RBC Dominion Securities**

**Name of Account:**

**United Way of the Lower Mainland**

**Contact: Brian Lundin**

**Email: brian.lundin@rbc.com Phone: 604-257-7333**

**Account number:**

**# 833-01094-1-7**

**Dealer/Rep code: 9190/TCT**

**CUID: DOMA FINS: T002 DTC: 5002**

I understand that I will receive a Gift-in-Kind tax receipt for these securities from the United Way of the Lower Mainland for the closing price, on the date these securities are received in the United Way's account. These securities have been donated to United Way of the Lower Mainland without restriction and can be sold by the United Way at any time considered appropriate.

Signature of Donor: \_\_\_\_\_ Date: \_\_\_\_\_

**Note:** The total amount of the donation available will be the selling price of the securities net of brokerage fees.

\*\*\*Donation to be directed to the **Saint James Music Academy** - Charity #83555 4817 RR0001\*\*\*

**CHECKLIST FOR YOUR CONVENIENCE:**

1. Please email ([warreno@uwlm.ca](mailto:warreno@uwlm.ca)) or call (604-268-1309) Warren Olson prior to the actual transfer of securities. Please do not transfer securities to United Way's brokerage account without prior notification. Warren will provide you with all the appropriate information to ensure your transaction is handled smoothly and efficiently.
2. Have you notified your broker of your intentions? If not, please do so. Please instruct your broker to initiate the transfer on your behalf to the United Way brokerage account. By faxing this form to them, this should be sufficient for authorization.
3. Once this form is completed, please email or fax a copy to Warren for United Way's records:  
Email: [warreno@uwlm.ca](mailto:warreno@uwlm.ca) Fax: 604-293-0220  
CC: [melodie@sjma.ca](mailto:melodie@sjma.ca)

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