

## INSTRUCTIONS FOR TRANSFER OF PUBLICLY TRADED SECURITIES

Thank you for choosing to give a gift of stock to the Bruyère Foundation. Your donation of publicly traded securities is exempt from capital gains tax **ONLY** when you transfer the securities in-kind to a registered charity.

### Electronic Transfer – Canadian or US Securities

#### INSTRUCTIONS

##### Direct Investing Clients

- Download a copy of your direct investing firm’s form from their website, complete and provide to them via fax at number provided.

##### Brokerage Clients

- Complete and sign a Notice of Donation of Gift of Securities form for each publicly traded security.
- Provide form to your broker.

##### Broker

- To support the electronic transfer of shares to the Bruyère Foundation’s Investment Advisor, please forward the form to our Investment Advisor, BMO Nesbitt Burns, prior to the transfer.
  - Lawrence Pleet: [lawrence.pleet@nbpcd.com](mailto:lawrence.pleet@nbpcd.com)

#### BROKERAGE DETAILS

Account name / Charitable organization name	Bruyère Foundation Inc.
Brokerage account	BMO Nesbitt Burns
Account number	49021454-18
Account transfer department	7 <sup>th</sup> floor, 250 Yonge Street Toronto ON M5B 2M8
Delivery instructions	FINS:T009 DTC: 5043 CUID: NTDT
Dealer number	9185 REP CODE:MBJ
Charitable Registration Number	88846 0441 RR0001

For questions, please contact Rowena Griffiths, CSA, Director of Philanthropy [rgriffiths@bruyere.org](mailto:rgriffiths@bruyere.org) OR 613-562-6319.

<b>NOTIFICATION OF GIFT OF SECURITIES</b>		
DONOR INFORMATION		
Donor Name:		
Daytime Phone:	Email:	
Street address:		
City:	Province:	Postal Code:
BROKER/INSTITUTION INFORMATION		
Broker/Institution Name:		
Broker address:	Account #:	
Phone:	E-mail:	Fax:
City:	Province:	Postal Code:
Advisor's Name:		
DONATION INFORMATION		
Name of Security:		
CUSIP:	Number of Shares/Units:	Date of Transfer:
Securities being transferred to:		
Bruyère Foundation	Account: 49021454-18	
BMO Nesbitt Burns	ATTN: Lawrence Pleet	<a href="mailto:lawrence.pleet@nbpcd.com">lawrence.pleet@nbpcd.com</a>
Tel: 613-562-6478		
<i>Please note that the date of the gift will be deemed to be the date on which the securities arrive in the Bruyère Foundation BMO Nesbitt Burns account. The value of the securities will be deemed to be the value of said securities at the close of business on the date received in the account.</i>		
Donor's Signature		Date

Please forward a copy of this completed form to Rowena Griffiths, CSA, Director of Philanthropy at rgriffiths@bruyere.org (this way we can track and expedite the process).