



**Please follow these steps to transfer your shares or mutual fund units to Our Place Society in electronic form.**

1. Contact Norma Cameron, Gift Planning Specialist, at Our Place Society: [normac@ourplacesociety.com](mailto:normac@ourplacesociety.com) or 250-940-5066 to ensure the Society is able to accept the gift of specific securities.

2. If yes, please complete this form with your broker and request them to initiate the transfer. If you do not have a broker, complete the form and email or fax it directly to your transferring institution.

3. Upon receipt of the transferred securities (which may take up to two days) and acceptance by Our Place Society, we will issue you a tax receipt for the opening price on the date received (settlement) in Our Place Society's account and in accordance with CRA regulations and Our Place Society policies.

### Questions?

If you have questions, or wish to discuss your preferences regarding gift recognition or anonymity, please contact Norma Cameron, Gift Planning Specialist: [normac@ourplacesociety.com](mailto:normac@ourplacesociety.com).

**Our Place Society Charitable  
Registration #82709 8344 RROOO1**

**THANK YOU FOR YOUR GIFT!**

## GIFTS OF SECURITIES DONATION FORM

**Donor/Transferor Information (to ensure your receipt and acknowledgement can be provided):**

Donor name: \_\_\_\_\_

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

City, Province: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Telephone: \_\_\_\_\_

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

Donor's account number: \_\_\_\_\_

Donor Broker's contact name: \_\_\_\_\_

Donor Broker's email: \_\_\_\_\_

### Securities Information

**I hereby authorize and direct the transfer in kind of the following securities from the above noted account to Scotia Wealth Management for credit to: Account # 467-45013-19: Our Place Society**

Security Description:	CUSIP/ISIN/ SEDOL #	# of shares/ units

### Authorization:

\_\_\_\_\_  
*Signature of donor*

\_\_\_\_\_  
**Date**

### Transferee Details

Our Place Society Account information:

c/o Scotia Wealth Management 40 King St. West, Toronto, ON M5W 2X6

**Account Number:** 467-45013-19

**Dealer Code:** 9155

**FINS #:** T085

**CUID #:** SCOT

**Please fax or email this form to the office of Ian Wheatley**

E: [ian.wheatley@scotiawealth.com](mailto:ian.wheatley@scotiawealth.com) Fax: 250-389-2135

**And to Our Place Society. Attention : Alf Eamer, Director of**

**Finance E : [finance@ourplacesociety.com](mailto:finance@ourplacesociety.com) FAX : 250-940-5069**