



Gift of Publicly Traded Securities Authorization Transfer Form

To process your donation please:

1. Forward the completed Transfer Form to your broker/investment advisor to initiate your electronic transfer of securities;
2. Forward a copy of the completed Transfer Form to United Way Oxford for our records. Unexpected &/or unidentifiable transfers make it difficult to issue tax receipts;
3. Be advised that the value of the donation receipt will be based on the closing price of the security on the date that securities are received into United Way Oxford's brokerage account, in accordance with our Board Policy and the Canada Revenue Agency Regulations.

Thank you for your donation!

1. DONOR INFORMATION:

First Name: _____ Initial: _____ Last Name: _____
Preferred Title: Ms. ☐ Miss ☐ Mrs. ☐ Mr. ☐ Dr. ☐ Anonymous: Yes _____ No _____
Street Address: _____
City: _____ Province: _____ Postal Code: _____
Home Phone: _____ Cell: _____ Email: _____

2. SECURITY TRANSFER AUTHORIZATION:

a) Please submit to your broker to initiate the transfer:

Broker/Institution: _____ Address: _____
Financial Advisor: _____ Business Phone: _____

I hereby authorize a transfer of the following securities as a gift to United Way Oxford:

Name of Shares: _____ # of Shares: _____ Estimated Value: _____

From my Account #: _____

To the United Way Oxford account at RBC Dominion Securities:

Account Name: United Way of Oxford CRA Charity Registration Number: 119303642 RR0001

Account Number: 645-15929-2-4 Financial Institution # 9190 Fins# T002

Contact Name: Cathy Lee cathy.lee@rbc.com (519) 539-7210

Donor Signature: _____ Date: _____

b) Please send copy by email to:

United Way Oxford
447 Hunter St., Woodstock, ON N4S 4G7
Attn: Finance Dept
(519) 539-3851 x300 Finance@unitedwayoxford.ca