

Charitable Donation Of Securities In Kind

RAYMOND JAMES®

Raymond James Ltd. is a
Member of CIPF & IIROC

IA #

Account #

Branch

Donor Information

Name _____ Address _____
City _____ Province _____ Postal Code _____ Phone Number _____

Donor's Brokerage Information

Financial Institution Name _____ Contact Name _____
Donor's Account Number: _____ Phone Number _____
E-mail _____ CUID: _____ DTC #: _____

Securities To Be Transferred

1. Name of Security: _____ Quantity _____ CUSIP/ISIN: _____
2. Name of Security: _____ Quantity _____ CUSIP/ISIN: _____

Charitable Organization & Brokerage Information

Registered Charity _____ Charity Registration # _____
Charity E-mail _____ Charity Broker A/C # _____
Name of Receiving Firm _____ CUID: _____ DTC #: _____ Phone Number _____
Broker Contact Name _____ Broker Contact E-mail _____

Donor Authorization:

I hereby give authority to my brokerage firm to deliver the above noted securities without restriction as a charitable donation as instructed on this form.

Signature of Donor _____ Signature of Donor _____ Date (mm/dd/yyyy) _____

To contact Raymond James please
direct any questions to:
transfersdonations@raymondjames.ca