



## Gifts of Securities

To make a donation of publicly traded securities to Branksome Hall please follow these steps:

- Inform Branksome Hall of your intention to make a gift of securities by completing this form and emailing it to Claudia Metelsky at [cmetelsky@branksome.on.ca](mailto:cmetelsky@branksome.on.ca). You may also contact her by telephone at 416-920-6265, ext. 324.
- Direct your stockbroker to deliver the securities to our broker Matthew Horan to process the sale of the shares. Matthew's assistant, Lanita Rozario, can be reached at 416-865-6444 or [lanita.rozario@scotiawealth.com](mailto:lanita.rozario@scotiawealth.com) to transfer the securities to Branksome Hall's custodial account through ScotiaMcLeod.

**ScotiaMcLeod #400-09429-1-4 | CDS: FINS #T085 | USDTC #5011 | CUID #SCOT**

We have also assigned ownership to Branksome Hall. The security will be valued according to its value at close of trade on the date it is received at ScotiaMcLeod, and a charitable tax receipt will be issued by Branksome Hall or the Branksome Hall Foundation to the donor for this amount.

### To be completed by the donor or donor's broker

**Donor's Name:** \_\_\_\_\_ **Daytime Telephone:** \_\_\_\_\_ **Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **Postal Code:** \_\_\_\_\_ **Investment Advisor's Name:** \_\_\_\_\_

**Firm Telephone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **Security's Name:** \_\_\_\_\_

**Symbol:** \_\_\_\_\_ **Traded on:** \_\_\_\_\_ **Share Description:** (common, preferred, etc.) \_\_\_\_\_ **Number of Shares:** \_\_\_\_\_

#### **Gift's Designation:**

☐ iCAST ☐ Student Financial Aid ☐ The Opportunity Fund

☐ Alumnae Association Endowed Bursary Fund ☐ Other \_\_\_\_\_

**Date of Transfer:** \_\_\_\_\_

By this signature, I hereby instruct my broker to effect the transfer proposed above upon confirmation by Branksome Hall.

**Donor's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**I would like to be recognized as:** \_\_\_\_\_

### To be completed by Branksome Hall's Advancement Office

Gift's Designation \_\_\_\_\_

Number of shares received: \_\_\_\_\_ Date received by broker: \_\_\_\_\_ Value

at close of trade on date of receipt: \_\_\_\_\_ Tax receipt amount: \_\_\_\_\_ Security's

date of sale: \_\_\_\_\_ Net cash proceeds after sale: \_\_\_\_\_ Finance

Office notified: \_\_\_\_\_ Date: \_\_\_\_\_