



**United Way**

Kingston, Frontenac  
Lennox and Addington

# GIFT OF SECURITIES

## Transfer Form to United Way of KFL&A

Charitable Registration Number: 125978270RR0001

**Thank you for making a gift of securities**

### A. Securities to be transferred from:

Name Workplace (if Applicable)

Address

Phone/Fax Email Address

I would like to be recognized in the Leadership Giving Program?  Yes  No

I would like my name to appear as:  
\_\_\_\_\_

Broker's Name Financial Institution

Broker's Address

Broker's Phone/Fax

### B. Type of Security to be transferred:

You are hereby directed to transfer the following securities from my account electronically to CIBC Wood Gundy, for deposit to:

CIBC Wood Gundy Account Number: 4700789516 CUID: WGBD, DTC #5030  
United Way of Kingston, Frontenac, Lennox & Addington

Number of Shares Name of Security

\$ \_\_\_\_\_ \$ \_\_\_\_\_  
Approximate Value of Each Share Approximate Total Amount

Date of Transfer to United Way's Account

\*\* A charitable tax receipt will be issued for the closing price of the securities on the day of the transfer to United Way. All securities are sold on the same day as received by United Way\*\*

Signature of Donor Date

Please help us handle and acknowledge your gift appropriately by scanning and emailing this form to Michelle Flegal [michelle.flegal@cibc.ca](mailto:michelle.flegal@cibc.ca) or fax it to (613) 531-5523

United Way of KFL&A  
417 Bagot Street, Kingston, ON K7K 3C1  
Tel: (613) 542-2674 Fax: (613) 542-1379

#### 4 Easy Steps to Follow to Complete your Gift of Securities



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1. Share this form with your broker and indicate the type and quantity of shares you would like to donate
2. Your broker will complete the form for you to sign on the bottom line
3. Your broker will transfer the completed signed form to the United Way brokerage at CIBC Wood Gundy
  - a. Email to Michelle Flegal at [michelle.flegal@cibc.ca](mailto:michelle.flegal@cibc.ca)  
or
  - b. Fax to Michelle Flegal at (613) 531-5523
4. We will be notified from our broker at CIBC Wood Gundy regarding the transfer and we will issue you a charitable tax receipt for your records

Please help us handle and acknowledge your gift appropriately by scanning and emailing this form to Michelle Flegal [michelle.flegal@cibc.ca](mailto:michelle.flegal@cibc.ca) or fax it to (613) 531-5523

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