

Gift of Publicly Traded Securities - Transfer Form



**Little Brothers
Foundation**

Embracing the Elderly

The Little Brothers Foundation thanks you for helping counter the isolation of seniors by donating publicly traded securities.

Here are the steps to follow to complete your donation and benefit from a significant capital gains tax credit:

1. The donor or their broker completes this Publicly Traded Securities Transfer Form.
2. The donor signs the form. Note that electronic signatures are accepted.
3. The donor's broker transfers the authorized securities to the Little Brothers Foundation account.
4. **IMPORTANT:** The donor's broker must send a copy of the completed and signed form to Little Brothers Foundation at the following email address: plannedgiving@littlebrothers.ca

DONOR INFORMATION

Name (or Name of Company): _____ Contact person: _____

Address: _____ City: _____ Postal Code: _____

Email address: _____ Telephone: _____

☐ I authorize Little Brothers Foundation to contact me by email.

DESCRIPTION OF TRANSFERRED SECURITIES

Title 1: _____ Amount: _____

CUSIP/ISIN No (mandatory): _____ Approximate value: \$ _____

Title 2: _____ Amount: _____

CUSIP/ISIN No (mandatory): _____ Approximate value: \$ _____

INFORMATION ABOUT DONOR'S BROKERAGE FIRM

Name: _____ Financial Institution: _____

Email address: _____ Telephone: _____

I hereby authorize my broker to transfer the above securities to Little Brothers Foundation and authorize my broker to contact Little Brothers Foundation for the purpose of completing this transaction. I understand that the value of the tax receipt will be equal to the closing price of the securities on the day the Little Brothers Foundation's brokerage firm acknowledges receipt.

Donor's signature: _____

Date: _____

INFORMATION FOR ELECTRONIC TRANSFER OF SECURITIES YOU WANT TO GIFT

Desjardins Online Brokerage
1170, rue Peel, Bureau 105
Montréal (Québec) H3B 0A9
1 866 873-7103
infodisnat@desjardins.com

Canadian and American securities :
Account in the name of Little Brothers
Account Number : 642X1A6
IDUC Code: VMDM

ANY QUESTIONS?

Do not hesitate to communicate with
**Carole Mercier, Director, individual major
gifts and planned giving**
at 514 527-6229, ext. 1016
or cmercier@littlebrothers.ca



**Little Brothers
Foundation**

4624, rue Garnier, Montréal (Québec) H2J 3S7 • Charitable organization number : 118922160 RR 0001

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