



Community Foundation
of Campbellford/Seymour
and Northumberland

**Charitable Donation of Publicly Traded Securities
Share Transfer Authorization Form**

Attention: _____
Full Name of Your Broker

Please accept this form as authorization to transfer _____
Number/Amount

Shares of _____
Name of Shares/Company

Currently held by _____
Your Brokerage Firm

From account _____
Your Account Number

This donation of securities will be transferred through the Community
Foundation of Campbellford/Seymour and Northumberland's brokerage firm,
iA Private Wealth:

Account Number: 38BOAQA

Dealer: 7923

CUID : NBCS

DTC : 5008

Contact Person: Steve Badlini
Mobile: 905-621-1488
Office: 705-653-5155
Email: steve.badali@iaprivatewealth.ca

Your Name

Mailing Address

City and Province

Postal Code

Telephone Number

Email Address

Community Foundation of Campbellford/Seymour and Northumberland to receive donation of securities

Donor Authorization:

Signature

Date

How to Donate Securities

1. **Fill out this form.** Note: We are comfortable accepting a form with an e-signature, as long as your broker/investment advisor accepts this format as well.
2. **Forward the completed form to your broker/investment advisor** to initiate the electronic transfer of the securities (CFCSN cannot initiate the transfer on your behalf). If you self manage your investments, contact Martha Murphy at CFCSN to guide you through the process.
3. **Forward a copy of the completed form to Steve Badlini at iA Private Wealth.** iA Private Wealth must receive a copy of the form directly from you or your advisor.
4. **Forward a copy of the completed form to Martha Murphy at CFCSN.**
5. **A tax receipt will be issued to you** for the closing price of the securities on the day they were received by iA Private Wealth.

**Community Foundation of
Campbellford/Seymour and
Northumberland**

P.O. Box 1146, 39 Doxsee Ave N.
Campbellford, ON K0L 1L0

Martha Murphy, CEO
705.653.2005
info@cfcsn.ca

CRA # 898077912 RR0001