



**United Way**  
East Ontario

WORKING WITH COMMUNITIES  
IN PRESCOTT-RUSSELL, OTTAWA,  
LANARK AND RENFREW COUNTIES

# NOTICE OF DONATION GIFT OF SECURITIES

Gift of publicly traded securities can be transferred by your broker to  
**United Way East Ontario through TD Wealth Private Investment Counsel Inc.**

## STEP 1

In order to ensure your transaction is handled smoothly and efficiently, please notify Lisa Marleau by email or fax **PRIOR** to the actual transfer of your shares. Please email or fax a copy of the completed form to:

**Lisa Marleau**

Administrative Associate

TD Wealth Private Investment Counsel Inc.  
1600 – 360 Albert St., Ottawa, ON K1R 7X7

**Tel:** 613.782.1256  
**Fax:** 613.783.4075

**Toll free:** 800.571.4456  
**Email:** lisa.marleau@td.com

**DTC:** 5036    **CUID:** GIST    **United Way Account Number:** 1HANVVA  
**Charitable Registration Number:** 108160250RR0001

## STEP 2

Please have your broker provide your full name, your contact information and the share transfer information below:

**Donor Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **Province:** \_\_\_\_\_ **Postal Code:** \_\_\_\_\_

**Business Phone:** \_\_\_\_\_ **Business Fax:** \_\_\_\_\_

**Home Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Donor Signature:** \_\_\_\_\_

**Name of Security:** \_\_\_\_\_

**Number of Shares:** \_\_\_\_\_ **Date of Transfer:** \_\_\_\_\_

**Your Broker's Name:** \_\_\_\_\_ **Phone or Email:** \_\_\_\_\_

**Transferring Institution Name:** \_\_\_\_\_ **Account Number:** \_\_\_\_\_

## STEP 3

Please email a copy of this form to:

Brian Reusch Serapio    Telephone: 613.299.2339    Email: brserapio@unitedwayeo.ca