



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 Advice.

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

Client Relationship Associate

TD Wealth Private Investment Advice

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