



# Gift of Publicly Traded Securities

**AUTHORIZATION AND DIRECTION FORM:** Please note: Your financial advisor **NEEDS TO INITIATE** the transfer of securities and forward a scanned copy of this completed form to:

.....  
 Sarah McPherson  
 Director, Philanthropy & Communications  
 sarah@theocef.org  
 Ph: 905.844.3562 ext. 302

AND

Brent Fletcher  
 RBC Dominion Securities  
 brent.fletcher@rbc.com  
 Fax: 905.849.4033 • Ph: 905.815.8347

.....  
 This form authorizes the transfer of the following securities to Oakville Community Foundation

RBC Dominion Securities  
**CUID: DOMA**

Account # 441-56312-1-9  
**DTC: 5002**

.....  
**Donor's Name** \_\_\_\_\_ **Donor's Email** \_\_\_\_\_

**Donor's Address** \_\_\_\_\_

**Donor's Telephone** \_\_\_\_\_

I/We further authorize the delivering institution to discuss the details of this transfer with RBC Dominion Securities, in order to facilitate this request.

**Type of securities\* (Please check)**  **CDN Stock**  **US Stock**  **Mutual Fund**

Number of securities: \_\_\_\_\_

Name of security: \_\_\_\_\_

Financial advisor's company: \_\_\_\_\_

Financial advisor's name: \_\_\_\_\_ Tel \_\_\_\_\_ Email \_\_\_\_\_

A tax receipt will be issued based on the closing price of the security, on the day the securities are received by RBC Dominion Securities.

**Direction of Shares:**

I hereby direct you to transfer the above named shares to The Oakville Community Foundation. This gift is intended for the:

\_\_\_\_\_  
*Name of Fund*

Gift to be Endowed  Flowthrough

**Donor Authorization**

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

