Donation of Publicly Traded Securities

About the Donor

Name of Donor(s) or Organization (where applicable) | Phone Number
---|---
Mailing Address | Province Postal Code
Email

About the Donor’s Financial Institution

Investment Advisor’s Name | Financial Institution
---|---
Phone | Fax Email
Financial Institution’s Mailing Address | Province Postal Code

What would you like to donate?

Description of the Security (Please include the CUSIP/ISIN.) | Number of Shares | From Account Name(s) and Number(s)
---|---|---

I (We) authorize and direct the transfer in kind of the above securities to the charity, through its receiving institution listed below.

Signature(s) of Donor(s) | Date (mm/dd/yyyy)

How to Donate Shares In-Kind

1. Notify your Investment Advisor, who can assist you in selecting suitable investments to transfer.

2. Complete and sign this form and forward it to your Investment Advisor, who will initiate the donation transfer process.

3. Notify us of your donation by sending a completed form to:

Diane Cook
Director of Development
(604) 737-0625 ext. 227
dcook@bardonthethebeach.org

Receiving Institution for Bard on the Beach

Charity’s Account Number: 015-9054-0
Canada Revenue Agency Charity Registration Number: 129644928 RR0001

Charity Investment Advisors | Russell Smith and Kevin Mah
T: 604-844-5423 or 1-888-886-3586 | F: 604-844-5319 | kmah@odlumbrown.com

Odlum Brown Limited
Suite 1100 - 250 Howe Street
Vancouver, BC V6C 359
Canada

Odlum Brown’s Transfer Department | T: 604-669-1600 | F: 604-844-5413
CUID: OBLV | DTC #: 5074 | CDCC #: 025 | Mutual Fund Dealer #: 9195 | OCC #: 792