



## Gift of Securities Processing Instructions for Donors and Brokers

**Thank you for your interest in supporting Closer to Home Community Services with a generous gift of securities. Here's how to make the donation:**

- Complete all sections of the Notification of Securities Transfer form including the name, value and number of each security to be transferred (donor or broker).
- **Donor** must sign and date the form.
- If a designation is not selected, the donation will be used towards our area of greatest need.
- E-mail or fax the completed Notification of Securities Transfer form to your broker to initiate the transfer with Closer to Home's broker:

Arvind Azariah  
RBC Dominion Securities  
Email: [arvind.azariah@rbc.com](mailto:arvind.azariah@rbc.com)  
Phone: 403-266-9681  
Closer to Home Community Services A/C 701-89508-11

- Also e-mail or fax the completed Notification of Securities Transfer form to:

Sarah Anne Taylor, Senior Manager Philanthropy  
Closer to Home Community Services  
200 – 1725 10 Avenue SW, Calgary AB T3C 0K1  
Email: [staylor@closerhome.com](mailto:staylor@closerhome.com)  
Phone: 403-543-0550 ext. 250  
Fax: 403-246-6406

- Our broker will notify Closer to Home upon receipt of the securities.
- A charitable tax receipt will be issued to the Donor within 14 days of receipt of securities. Receipt amount will be based on the closing price of the date the shares are received into Closer to Home's account.

**Thank you for ensuring children and families will have a brighter future, together!**

If you have any questions or concerns, please contact **Sarah Anne Taylor** at Closer to Home Community Services at **403-543-0550 ext. 250**.



## Notification of Securities Transfer: Single Security

To ensure the prompt issuance of a charitable tax receipt, this form must be emailed or faxed to Closer to Home Community Services **prior to transferring shares to our account**. Please complete all sections below, have the donor sign and date this form, and send it by email or fax to Sarah Anne Taylor, Senior Manager Philanthropy ([staylor@closerhome.com](mailto:staylor@closerhome.com)) OR fax: 403-246-6406.

If you have more than two securities to transfer, please contact our office for the multiple securities form.

### PLEASE PRINT CLEARLY:

Donor Name			
Donor Daytime Phone		Alternate Phone	
Donor Home Address			
Donor Email			
Advisor/Broker Name			
Advisor Firm Name			
Advisor/Broker Email			
Advisor/Broker Phone			
Account Name			
Client Account Number			

### DESCRIPTION OF SECURITIES:

Security / Shares Name			
Exchange Name		Ticker Symbol	
Approximate Value of Each Share		Number of Shares to Transfer	

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### DONOR SIGNATURE AND CONFIRMATION:

I confirm that these securities have been donated to Closer to Home Community Services without restriction and can be sold by Closer to Home at any time. I understand I will receive a tax receipt from Closer to Home based on the closing market price on the date that the shares are received into Closer to Home's account.

I wish my donation to be directed:

- where needed most
- specific area: \_\_\_\_\_



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**Signature of Donor**

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**Date Signed**

**To transfer securities, please provide this information to your broker/advisor:**

**Receiving Institution:** RBC Dominion Securities Inc.  
**Account Name/Number:** CLOSER TO HOME COMMUNITY SERVICES  
A/C 701-89508-11  
**CTH Broker Contact:** Arvind Azariah  
Email: arvind.azariah@rbc.com  
Phone: 403-266-9681

**Thank you for ensuring children and families will  
have a brighter future!**