

# Charitable Donation Of Securities In Kind

**RAYMOND JAMES®**

Raymond James Ltd. is a  
Member of CIPF & IIROC

IA #

Account #

Branch

## Donor Information

Name \_\_\_\_\_ Address \_\_\_\_\_  
City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_ Phone Number \_\_\_\_\_

## Donor's Brokerage Information

Financial Institution Name \_\_\_\_\_ Contact Name \_\_\_\_\_  
Donor's Account Number: \_\_\_\_\_ Phone Number \_\_\_\_\_  
E-mail \_\_\_\_\_ CUID: \_\_\_\_\_ DTC #: \_\_\_\_\_

## Securities To Be Transferred

1. Name of Security: \_\_\_\_\_ Quantity \_\_\_\_\_ CUSIP/ISIN: \_\_\_\_\_  
2. Name of Security: \_\_\_\_\_ Quantity \_\_\_\_\_ CUSIP/ISIN: \_\_\_\_\_

## Charitable Organization & Brokerage Information

Registered Charity \_\_\_\_\_ Charity Registration # \_\_\_\_\_  
Charity E-mail \_\_\_\_\_ Charity Broker A/C # \_\_\_\_\_  
Name of Receiving Firm \_\_\_\_\_ CUID: \_\_\_\_\_ DTC #: \_\_\_\_\_ Phone Number \_\_\_\_\_  
Broker Contact Name \_\_\_\_\_ Broker Contact E-mail \_\_\_\_\_

## Donor Authorization:

I hereby give authority to my brokerage firm to deliver the above noted securities without restriction as a charitable donation as instructed on this form.

Signature of Donor \_\_\_\_\_ Signature of Donor \_\_\_\_\_ Date (mm/dd/yyyy) \_\_\_\_\_

To contact Raymond James please  
direct any questions to:  
[transfersdonations@raymondjames.ca](mailto:transfersdonations@raymondjames.ca)