



**United Way**  
Waterloo Region  
Communities

**Share Transfer Form**  
**Gifts of Publicly Traded Securities**

<b>1) Information for Donor's Broker</b>	
United Way WRC Broker	RBC Dominion Securities, Paul Morris
Account Name	United Way Waterloo Region Communities (United Way WRC)
Account #	3614639411
FIN#	T002
Charitable #	119278133 RR0001
<b>2) To be completed by Donor</b>	
Name	
Address	
Phone #	
Workplace (if applicable)	
Name of Donor's Broker	
Broker's Firm	
Broker's Phone #	
Donor's Account Number	
Name of Security	
Number of Shares Transferred	
Approx. Value of each Share	\$
Approx. Total Amount of Donation	\$
Date of Transfer to United Way's Account	
<b>3) Important Information</b>	
<b>Notification:</b> Please notify Kim Conway, Finance Clerk, email: <a href="mailto:kconway@uwaywrc.ca">kconway@uwaywrc.ca</a> , or phone: 519.888.6100, ext 214, <b>prior to the actual transfer of the shares.</b> To ensure the accuracy of the donation, United Way WRC will not authorize any sales of stock without confirmation of the donor, the type and the number of the stock.	
<b>In order to complete this trade:</b> a) Email this form to Kim Conway ( <a href="mailto:kconway@uwaywrc.ca">kconway@uwaywrc.ca</a> ) b) Instruct your broker to initiate the trade and transfer the shares to United Way WRC	
<b>Authorization:</b> These securities have been donated to United Way WRC without restriction and, in accordance with United Way WRC policy, will usually be sold by the end of the day following business day. I understand that I will receive a tax receipt from United Way WRC in accordance with CRA regulations. The receipt will be issued for the value of the shares at the closing bid price on the date it was received. In some cases, the midpoint between the high and low trading prices for the day will be used if this is a better indicator of the fair market value of the shares. For non-publicly traded shares, United Way will consult with the donor and United Way's advisors to determine the fair market value of donated shares. Because of delay in transfer, the receipted amount may be less, or more, than on the date of transfer from the donor. For more information on valuation of donated shares, please see <a href="https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/receiving-gifts/donation-shares.html">https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/receiving-gifts/donation-shares.html</a>	
Signature of Donor: _____ Date: _____	