



**United Way
Maritimes**

Serving Central
& Southwestern NB,
PEI & Mainland NS

Stronger together.
United for impact.

Gift of Securities Transfer Form

To Donate Securities

1. Complete the transfer form on the next page, sign, scan and email it to United Way Maritimes:
nicole.cameron@unitedwaymaritimes.ca
2. Instruct your broker to transfer your securities to United Way's brokerage account. Please do not transfer securities without first forwarding this form to United Way.
United Way's Brokerage Account: CIBC Wood Gundy A/C 271-13417-15 FINS: T079 CUID: WGDB Contact: Laura
Long Tel: 902-420-6242
3. A charitable tax receipt will be issued for the closing price of the securities on the day of the transfer to United Way.
4. Eligibility for a tax receipt for the current year requires that securities must be in United Way's brokerage account by 5 PM on December 31st of that year.

Should you have any questions, please contact Nicole Cameron at (C) 902.402.6680.

Donor Privacy: United Way Maritimes is committed to protecting the confidentiality of donor data. The information you provide is used to process and recognize your donation, issue tax receipt and fulfill any specific donation requests.

unitedwaymaritimes.ca

Charitable registration number: 11927-8232-RR0001

Gift Details

Name of Security

Number of Shares Transferred

Approximate value of each share

Approximate value of donation

Broker Details

Broker Name

Financial Institution

Phone Number

Email

Brokerage account number

Donor Details

Donor Name

Address

Phone Number

Email

Please select the United Way(s) you wish to support:

☐ United Way Lunenburg County ☐ United Way Pictou County ☐ United Way Colchester & Cumberland Counties
☐ United Way Halifax ☐ United Way Central NB ☐ United Way Saint John, Kings & Charlotte ☐ United Way of PEI

Donor Recognition:

My preferred recognition name for donor recognition is:

☐ Yes, my name may be included in a list of United Way donors.

Tax Receipt:

I understand I will receive a charitable tax receipt from United Way Maritimes based on the closing price of the day the stocks are received/transferred into United Way Maritimes brokerage account. To receive a tax receipt for the current year, the shares must be transferred/received by 5PM on December 31 of that year.

Donor Signature

Date

Thank you
for supporting the United Way!



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