



Gift of Securities Transfer Document

Security transfers from a donor's brokerage account into The Guelph Community Foundation's account:

When securities are held in a brokerage account, there is no need to transfer the actual certificates. The donor instructs the broker to transfer the securities from his/her account into the charity's account. The fair market value will be determined as of the closing price on the day the securities are received by The Guelph Community Foundation's financial institution. The Guelph Community Foundation issues official receipts for income tax purposes (charitable registration #86727 8350 RR001). Please contact us regarding estate gifts.

Leith Wheeler Investment Counsel Ltd. is the investment firm managing The Guelph Community Foundation's funds, custodied at **Aviso Wealth**

Contact: Palak Vaid: ACPsupport@aviso.ca

FIN: T088 DTC: 5083 CUID: CRED

T: (289) 497-2706 F: 1.855.714.3800

42 Wyndham St N, 3rd Floor, Guelph, ON N1H 4E6

The Guelph Community Foundation's Account at Aviso Wealth:

Flow-Through Fund #53181AA1/B1

Endowment Fund #53180AA1/B1

① Please complete this form for a timely transfer. Please have your broker **scan and email a completed copy of this form to Aviso Wealth, Att: Palak Vaid, Leith Wheeler, Att: Mike Baker (mikeb@leithwheeler.com) AND email a copy to The Guelph Community Foundation (admin@guelphcf.ca)**, advising that a securities transfer is about to take place. A separate transfer document should be used for additional shares.



Donor Name & Address:

(Donor's name and full address for tax receipt purposes)



Fund Name:

(Please name the fund held at the Guelph Community Foundation, click [here](#) for a list of funds)

② Transfer Details:

Name of Brokerage Firm:	
Broker's Name:	
Broker's Phone & Email:	
Transfer Details Sent: [# of shares & type—based on Fair Market Value]	
For office use only: [details of transfer received]	

③ Upon receiving the transfer, Aviso Wealth will contact The Guelph Community Foundation and advise them of the details and value of transfer. The Guelph Community Foundation will then contact the donor to confirm that the gift was received.

Confidentiality and privacy is important to us. The Foundation publishes a list of supporters as a form of appreciation. If you would like to remain **anonymous** on this list, please check here .

④ **Contributing Client Authorization:**



Signature of Donor

Date

Donor Phone Number

Donor Email