

# Securities Transfer Form

Thank you for your generous gift. You help ensure we continue to provide compassionate support, tailored coaching, and practical education for everyone impacted by dementia.

To make a gift of securities to the Dementia Society of Ottawa and Renfrew County, please:

- 1) Complete this form and provide it to your broker.
- 2) Send a copy of this form to Gopika Shingari at [gshingari@dsorc.org](mailto:gshingari@dsorc.org).

## Donor Information

Name: \_\_\_\_\_

Organization/Company: \_\_\_\_\_

Address: \_\_\_\_\_

Email # \_\_\_\_\_ Telephone # \_\_\_\_\_

- ☐ Please issue charitable tax receipt to **individual** indicated above.  
☐ Please issue charitable tax receipt to **company** indicated above.

## Donor's Broker Information

Broker Name/Institution: \_\_\_\_\_

Attention: \_\_\_\_\_ Telephone # \_\_\_\_\_

FINS # \_\_\_\_\_ Client Account # \_\_\_\_\_

## Securities Transfer Information

Full Name: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Market Symbol: \_\_\_\_\_

I, \_\_\_\_\_, hereby irrevocably authorize the transfer of shares from my account to Account # **H0D-YTFO-E** in the name of "The Dementia Society of Ottawa and Renfrew County." Charitable Registration # 118785013 RR 0001

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Receiving Institution Information

Richardson Wealth • 343 Preston Street, Suite 300 • Ottawa, ON K1S 1N4 • CUID: FIDC & DTC: 5040

Attention: Sasha Peloso • 613-788-8035 • [Sasha.Peloso@RichardsonWealth.com](mailto:Sasha.Peloso@RichardsonWealth.com)

## Important Information About Your Income Tax Receipt

The value of your tax receipt is based on the closing price on the day the securities are received by The Dementia Society of Ottawa and Renfrew County. Charitable Registration # 118785013 RR 0001