

# OPTIONS COMMUNITY SERVICES

## Share Transfer Form for Publicly Traded Securities



Donor Information:

Email: \_\_\_\_\_

Name of Donor: \_\_\_\_\_ Daytime Tel: \_\_\_\_\_

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

Name of Donor's Broker: \_\_\_\_\_ Your Broker's Tel: \_\_\_\_\_

Broker's Firm: \_\_\_\_\_

Name of Account and Account #: \_\_\_\_\_

Name of Security: \_\_\_\_\_ # of Shares Transferred: \_\_\_\_\_

Approx. Value of Each Share: \_\_\_\_\_ Approximate Value of Gift: \_\_\_\_\_

Description and Class of Security (common, preferred, mutual fund, etc.) \_\_\_\_\_

**Receiving Brokerage:** RBC Dominion Securities  
CDS FINS No.: T-002  
CUID: DOMA  
Acct: 810-14262-14  
Contacts: Bryon Whiteley 604.535.3894 or Janeen Brodie 604.535.3866

I wish to make a charitable donation consisting of the listed securities to Options Community Services Society (OCS). Further to this, please accept this form as my authorization for you to transfer in-kind, the above listed securities from my brokerage account to the OCS brokerage account. It is my understanding that this transfer and gifting represents a disposition for which I will be provided with a donation receipt form Options Community Services Society. The amount of the receipt will be based on the value of the close of trading on the date they are received by OCS in their brokerage account. Options Charitable # is 811786227 RR0001

Signature of Donor: \_\_\_\_\_

Date: \_\_\_\_\_

1. Please call Ginny Hasselfield at 778.877.0108 or email [ginny.hasselfield@options.bc.ca](mailto:ginny.hasselfield@options.bc.ca) prior to the actual transfer of securities. She will provide you with all the appropriate information to ensure your transaction is handled smoothly and efficiently.
2. Please notify your broker of your intentions. Please instruct your broker to initiate the transfer on your behalf to Options brokerage account by faxing or emailing this completed and signed form to your broker.
3. Once the form is completed please fax or email a copy to: Ginny Hasselfield at 604.584.7628 or [ginny.hasselfield@options.bc.ca](mailto:ginny.hasselfield@options.bc.ca)

Building Community. Inspiring Hope. Together. Thank you!