

DIRECT TRANSFER OF STOCK OR MUTUAL FUNDS**I/We hereby AUTHORIZE:**

Name of Donor's Brokerage Firm:		Contact Name:
Address		
City	Province	Postal Code
Phone	Fax	E-mail

To Transfer from my/our Account Number: _____, the following shares in-kind:

Quantity:	Name of Security:	Symbol, if known:

To the following account in the name of Link Charity Canada Inc.:

Brokerage: _____ Account Number: _____

Contact: _____ Contact Phone: _____

Please process this transfer immediately. This transfer is a charitable donation.

Donor(s) Information:

Family Name		Given Name(s)
Address		
City	Province	Postal Code
Phone	Fax	E-mail

Signatures (Brokerage will likely require a bank guarantee stamp):_____
Donor_____
Co-Donor_____
Date:

Instructions:

The instructions below will guide you through the process of stock or mutual funds transfers. Contact information for Link Charity is available at the top of this form.

1. Link Charity has 9 brokerage accounts to ensure the transfer of your stock or mutual funds is easily done. Please contact Link Charity at 1-800-387-8146 to determine which account will work best for your transfer. Your broker can also manage this call.
2. Send the original copy of the transfer form to your broker. Link Charity would appreciate receiving a copy of the form for its records.
3. When a transfer is initiated, Link Charity should receive an accompanying Letter of Direction containing any selling restrictions or gift designations. A sample Letter of Direction is available on our website. Please send Link Charity the original; it is not necessary to provide the letter of direction to your broker.
4. Gifts received will be sold in accordance with the donor's instructions and receipted according to Link Charity Canada Inc.'s receipting policy. For information on this policy, please contact Link Charity.
5. Link Charity Canada Inc. requests permission to charge a small fee to recover costs incurred as a result of the transfer and sale. From the gross proceeds of the sale, Link Charity deducts any selling commissions (charged by the receiving brokerage) as well as a Link Charity cheque fee of \$25 for the first beneficiary of a transaction and \$10 for each additional beneficiary.



101-334 Donlands Ave. Toronto, ON M4J 3R9
1-800-387-8146 Fax: 416-465-6367
www.linkcharity.ca info@linkcharity.ca

DISTRIBUTION OF PROCEEDS LETTER OF DIRECTON

I am transferring the following securities to Link Charity Canada Inc.:

of shares

Name of security

Sending Brokerage: _____ Receiving Brokerage: _____

Please sell/redeem at: ☐ Market Value ☐ A price not less than \$_____/share

Link Charity, please donate the proceeds to the charities in the amounts/ percentages listed below:

(if giving dollar amounts, please designate one charity to receive "the balance")

Amount (\$ or %)	Charity Name and Address	Designation or Restriction (if any)	Contact Person (if any)

If more charities, please attach another page with a full listing of amounts/percentages

Applicant:

Family Name		Given Name	
Address			
City	Province	Postal Code	
Phone	Fax	E-mail	

Signature(s):

_____ Date: _____

This page should be sent to Link Charity only – do not send it to your brokerage.

*Link Charity's fee is \$25 for the first charitable beneficiary and \$10 for each additional beneficiary of the same transaction