

Gifts of Securities

Transfer Authorization Form



Please forward a copy of your completed form to Erica More at emore@phoenixyouth.ca. Any questions can be directed to Erica or our main phone line 902-422-3105.

Donor(s) Information:

Name(s): _____ Holding Company (if applicable): _____

Address: _____

Phone: _____ Email: _____

Client Account Number: _____

Broker Information:

Name: _____ Firm: _____

Phone: _____ Email: _____

Donation Information:

Name of Security: _____ Number of Units: _____

Estimated Fair Market Value per Security: _____ CUSIP #: _____

Donor Signature

Transfer Date

Gifting Securities is Simple:

1. Work alongside your broker to complete this form and forward a copy to Phoenix directly.

If you are looking to receive a tax receipt for this calendar year, please initiate this gift by December 15, as gifts of securities take longer to process than gifts of cash.
2. Phoenix Youth Programs will confirm the transfer with you once it is complete.
3. You will be provided with a charitable tax receipt for the closing price of the securities on the day they are received.

Questions can be sent to emore@phoenixyouth.ca or our main phone line 902-422-3105.

Phoenix Youth Programs Broker:

RBC Dominion Securities Inc
1959 Upper Water Street, Suite 1400, Purdy's Tower 1
Halifax, NS B3J 3N2
Contact: Kayla McCoy | 902-421-2089
Account # 27032715-16
DTC: 5002
CUID: DOMA
FIN: T002

Phoenix reserves the right to accept or decline a donation of shares. Such right may be exercised within a reasonable period after physical or electronic donation has occurred. All shares donated to Phoenix shall be analyzed for thinly traded volumes or other restrictions on immediate sale. The donation of any such restricted shares would be subject for agreement between relevant management responsible and donor before acceptance.