



# DONATION OF SECURITIES FORM

## DONOR INFORMATION

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

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

City: \_\_\_\_\_ Prov: \_\_\_\_\_ Post: \_\_\_\_\_

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

## DONOR'S BROKER INFORMATION

Financial Institution: \_\_\_\_\_

Donor's Account#: \_\_\_\_\_ Broker's CUID: \_\_\_\_\_

Broker's Name: \_\_\_\_\_

Broker's Phone: \_\_\_\_\_ Broker's Email: \_\_\_\_\_

## DESCRIPTION OF SECURITIES

# Shares: \_\_\_\_\_

Name of Security: \_\_\_\_\_

Security Number: \_\_\_\_\_

Approx. date of transfer: \_\_\_\_\_

## SECURITIES TO BE TRANSFERRED TO

Account Name: CUPS Calgary Society

Account #: 755-40776-15

Broker: Cacic Wealth Management (Cynthia Wright)

Broker's Phone: 403-266-0180 Email: cynthia.wright@cibc.ca

DTC: 5030 CUID: WGDB

CIBC's Dealer#: 9280 Institution Code: T079

Institution Name: CIBC Wood Gundy Account Transfer Department

Institution Address: 4th Floor, Brookfield Place,  
161 Bay St, PO Box 500, Toronto, ON M5J 2S8

By signing this form, I confirm my intention and authorize the in-kind transfer donation of the above-named securities to the CUPS Calgary Society

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

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

**1. Complete this form.** This information is needed for the transfer, tracking and receipting of your donation.

**2. Give the form to your broker.** Your broker will arrange for the transfer of shares to the CUPS Calgary Society investment account. CUPS Calgary Society cannot initiate the transfer.  
If you do not have a broker, fax this form directly to your investment firm.

**3. Send a copy of the form to our broker (or ask your broker to do this):**  
Cacic Wealth Management  
Cynthia Wright  
Phone: 403-266-0180  
Email: [cynthia.wright@cibc.ca](mailto:cynthia.wright@cibc.ca)

**4. Send a copy of the form to CUPS Calgary Society (or ask your broker to do this),** so we may ensure a donation receipt is issued for your gift.

**CUPS CALGARY SOCIETY**  
charitable registration number:  
**13411 2515 RR0001**