

AlzheimerSociety

ALBERTA AND
NORTHWEST TERRITORIES

Gift of Publicly Traded Securities

Transfer Intent Form

Step 1: Prior to transferring securities to us, please fax or email this form to

Holli Bjerland
Provincial Lead Philanthropy
Alzheimer Society Alberta and Northwest Territories
306 – 10430 - 61 Avenue NW
Edmonton, Alberta T6H 2J3
Phone: 780-488-2266 or Toll free: 1-866-950-5465
Fax: 780-488-3055
Email: hbjerland@alzheimer.ab.ca

Step 2: Donor Information – Name of donor for charitable receipting purposes

Name: _____
Address: _____ City: _____
Province: _____ Postal Code: _____
Phone: _____ Email: _____

Step 3: This letter will confirm my intention to donate the following securities to the Alzheimer Society of Alberta and Northwest Territories without restriction and which can be sold at any time considered appropriate.

Name of Shares: _____
Number of Shares: _____
Authorization signature: _____ Date: _____

Step 4: Your Broker/Delivering Custodian Information

Name of Firm: _____
Broker's Name: _____
Phone: _____ Email: _____

Step 5: To transfer securities, please advise your broker of the following Alzheimer Society Broker details

Contact: Linda Desnoyer Institution: BMO Nesbitt Burns CUID: NTDT DTC: 5043
Complete Mailing Address: Suite 800, Manulife Place 10180-101 Street NW Edmonton, AB T5J 3S4
Phone: 780-945-5253 Fax: **780-448-9858** Account #: 7152844218

Please be advised that the value of the donation receipt will be based on the closing price of the securities on the day that they are received into the Society's account in accordance with CRA Regulations.