

# AlzheimerSociety

ALBERTA AND  
NORTH WEST TERRITORIES

## Gift of Publicly Traded Securities

### Transfer Intent Form

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

April Grindheim  
Senior Donor Relations Officer  
Alzheimer Society Alberta and Northwest Territories  
306 – 10430 - 61 Avenue NW  
Edmonton, Alberta T6H 2J3  
Phone: 780-761-0036 or Toll free: 1-866-950-5465 ext 401  
Fax: 780-488-3055  
Email: [agrindheim@alzheimer.ab.ca](mailto:agrindheim@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: Enbridge Center Flr 19th 10175-101 Street NW Edmonton, AB T5J 0H3  
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.