

# 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**

Lindsay Burnham  
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: [lburnham@alzheimer.ab.ca](mailto:lburnham@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.