



United Way
Sarnia-Lambton
theunitedway.on.ca

Gift of Securities

Donor Information

First Name

Initial

Surname

Address

Phone

e-mail

Transferring Institution

Delivering Institution: _____

Financial Advisor: _____ Phone: _____

Address of Delivering Institution: _____

CUID ID # of Transferring Institution _____

Account #: _____ (Account no. of Transferor/Donor at Transferring Institution)

Transfer Information

Requested transfer date: _____

You are hereby authorized and directed to **transfer in kind** the following securities from the above noted account to the UNITED WAY OF SARNIA-LAMBTON - RBC Investor Services account number 231362001, using the transfer information provided below.

Security Name

CUSIP/ISIN/SEDOL#

of shares/units

Approx Share Value

Approx. Donation Value

Exchange Name

Security Name CUSIP/ISIN/SEDOL# # of shares/units

Approx Share Value Approx. Donation Value Exchange Name

Credit account: UNITED WAY OF SARNIA-LAMBTON

A/C : 231362001

Canadian Securities

CUID: RTRA
Re: United Way of Sarnia-Lambton
Acct #: 231362001

Physical Certificates:

RBC Investor Services
Securities Cage
155 Wellington Street West, 2nd Floor
Toronto, ON M5V 3L3
Re: United Way of Sarnia-Lambton
Acct #: 231362001

Mutual Funds

Mail Deliveries:

RBC Investor Services
Pooled/Mutual Fund Operations
P.O. Box 7500 Station A
Toronto ON M5W 1P9
Re: United Way of Sarnia-Lambton
Acct #: 231362001

U.S. Securities

DTC #: 901
Agent ID#: 80901
T-Bills / Strip Bonds: ABA # 021 000 018
Institution #: 53372
Account #: 298307
Re: United Way of Sarnia-Lambton
Acct No.: 231362001

Physical Certificates:

Bank of New York
1 Wall Street 3rd Floor Window A
New York, NY USA 1004-2413
Account #: 298307
Re: United Way of Sarnia-Lambton
Acct No.: 231362001

Signature of Transferor/Donor

Date

1 Copy to United Way of Sarnia-Lambton for Tax Receipt Purposes (Fax 383-6032 or Phone 336-5452)

1 Copy to Donor's Broker to request transfer

1 Copy faxed or emailed to:

RBC Investor Services, Investment Counsellor Services
Attn: Philippe Michaud, Client Service Manager
Fax: (416) 974-6905 Telephone: (416) 955-5253

Note: Securities may be returned to transferring institution if a copy of this letter has not been faxed to RBC Investor and Treasury, Investment Counsellor Services. Failure to provide sufficient details on this letter may also result in failure to settle.