



### Security Transfer Form

**Donor Information:**

Name: \_\_\_\_\_ Telephone: (B ) \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: (H ) \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

**Broker Information and Donor Authorization:**

**Client Account #** \_\_\_\_\_

Name of Broker: \_\_\_\_\_ Firm: \_\_\_\_\_

Broker's ph: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ Date of transfer: \_\_\_\_\_

Name of security(s): (i) \_\_\_\_\_ No. of shares: (i) \_\_\_\_\_

(ii) \_\_\_\_\_ (ii) \_\_\_\_\_

Cusip: \_\_\_\_\_

Description and class of securities (i) \_\_\_\_\_

(e.g. common, preferred, mutual fund units, etc.):

(ii) \_\_\_\_\_

This gift is made in support of the: \_\_\_\_\_

Name for donor recognition (if different from donor name above): \_\_\_\_\_

I wish to make a charitable gift consisting of listed securities to YMCA of Greater Vancouver. Further to this, please accept this form as my authorization for you to **transfer in-kind**, the above listed securities from my brokerage account to the YMCA brokerage account held at Royal Bank (trade settlement details below). It is my understanding that this transfer and gifting represents a disposition for which I will be provided with a donation receipt from YMCA of Greater Vancouver. The amount of the receipt will be based on the value as of the close of trading on the date they are received by the YMCA in their brokerage account.

Signature of Client: \_\_\_\_\_ Name: \_\_\_\_\_ Date: \_\_\_\_\_

If applicable:

Joint Signature of Client: \_\_\_\_\_ Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Transfer Information for the YMCA of Greater Vancouver:**

The brokerage account for the YMCA of Greater Vancouver is held at Royal Bank - 'RBC Direct Investing' Investment account. Arrange for the shares to be transferred to the account: The YMCA of Greater Vancouver.

**Investment Account number # 6876817013**

**FINS # T002 DTC # 5002 CUID # DOMA**

This is an online brokerage account however if you or your broker needs to contact them directly please contact the Transfers Department via the toll free number [1-800-769-2560](tel:1-800-769-2560).

**Please advise our team when the transfer has been made to help us monitor the transaction.**

- Finance – [604-633-3555](tel:604-633-3555) [finance@gv.ymca.ca](mailto:finance@gv.ymca.ca) or
- Fund Development – [604-622-4964](tel:604-622-4964) [giving@gv.ymca.ca](mailto:giving@gv.ymca.ca)