
GIFT OF PUBLICLY TRADED SECURITIES

Transfer Intent Form

Step 1: Donor information – Name of donor for charitable receiving purposes:

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

Gifts of \$1,000 or more are acknowledged in our Annual Report.

Please indicate if you prefer to remain anonymous

Step 2: This letter will confirm my intention to donate the following securities to the Alzheimer Society of Canada without restriction and which can be sold at any time considered appropriate:

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

Please indicate if you would like your donation directed to:

- Area of Greatest Need
 Research
 Other – I'd like to speak to someone about other ways my gift can make a difference.

Step 3: Your Broker/Delivering Custodian Information:

Name of firm: _____
Broker's name: _____
Phone: _____ Email: _____

Step 4: To transfer securities, please advise your broker of the following Alzheimer Society broker details:

Ella Grimshaw, RBC Dominion Securities
Royal Bank Plaza, P.O. Box 88, Suite 3900, Toronto
Phone: 416-842-2331
Account # is 441-736 87-1-1 and please quote our CUID code as "DOMA"

*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 our policy and Canada Revenue Agency (CRA) regulations.

Step 5: Notify the Society by emailing a copy of the completed transfer form to: PlanGiving@alzheimer.ca

This step is important because securities are transferred into our account on an anonymous basis. Notifying us will ensure you receive our thanks, any appropriate recognition, and your official receipt for income tax purposes. **For more information, visit <https://alzheimer.ca/en/take-action/donate/make-gift-stock>**