



**To provide United Way Leeds & Grenville Fund with shares, please follow the instructions below**

1. Contact your financial advisor or broker and provide them with the following so that they may initiate the transfer to the Ottawa Community Foundation account for United Way Leeds & Grenville.

**Charitable Registration No. 119227981RR0001**

**National Bank Independent Network:**

**Canadian securities**

**US securities**

**Mutual Funds**

Account No. 6C768ZA (FINS: T080) (CUID:NBCS)

Account No. 6C768ZB (DTC: 5008)

Dealer #9822; CUID: NBCS; Rep Code: A6WC

2. Please fax/e-mail this form to **613-236-1621** or [finance@ocf-fco.ca](mailto:finance@ocf-fco.ca), so that we can notify our investment account manager to receive the gift and provide a tax receipt\* for your gift.

If you are a financial advisor, or if you have any questions, please contact Gary Zhao, Comptroller, at 613-236-1616 ext. 240 or [gzhao@ocf-fco.ca](mailto:gzhao@ocf-fco.ca).

**Please note:** Ottawa Community Foundation has an arrangement with the United Way Leeds & Grenville, allowing the Foundation to manage their securities donations. This relationship allows for the timely sale, receipting and deposit of securities, with the proceeds of the sale benefiting United Way Leeds & Grenville.

**Donor and share information:**

Donor/Registered holder	Name:	
	Address:	
	Email/Telephone:	
Shares	Name:	
	Number:	
	Approximate \$ Value:	
Investment Advisor:	Name:	
	Firm:	
	Email/Telephone:	

**Direction to gift Shares:**

I hereby direct you to transfer the above named shares to the Ottawa Community Foundation.  
This gift is intended for the: **United Way Leeds & Grenville Fund**

Signature of registered holder and donor\*\*

Date

*\*A receipt will be issued for the donation amount. The donation amount is the value of the securities at the close of business on the day the securities are received in the Foundation's account.*

*\*\*If this form is sent from the donor's personal email address no signature is required.*