

Gift of Publicly Traded Securities to Heritage Park Society

Step	Responsibility			
	Donor	Donor's Broker	HP Broker	Heritage Park
Complete this form	✓			
Give the form to your broker or investment firm and email a copy to FundDevelopment@heritagepark.ca . Heritage Park cannot initiate transfers	✓			
Transfer stock from Donor's account to Heritage Park's broker: National Bank Financial – Email: Ariel.Leaver@nbc.ca or linda.le@nbc.ca Fax # 403-301-4026 Account # 4A634ZA DTC 5008 CUID NBCS Dealer code 9139 Rep code 7TAE		✓		
Liquidate stock and send proceeds to Heritage Park			✓	
Send Donor a charitable donation tax receipt as applicable under CRA rules. The value of the donation receipt is based on the closing price of the shares on the day the shares are received by the Society's broker				✓

DONOR INFORMATION

Name _____

Address _____

City/Province _____ Postal Code _____

Phone _____ Email _____

DONOR'S BROKER INFORMATION

Company Name _____ Broker's Name _____

City/Province _____ Postal Code _____

Phone _____ Email _____ Fax _____

SECURITIES TO BE TRANSFERRED

From account # _____

_____ Shares of _____
of shares *name of security*

_____ Shares of _____
of shares *name of security*

I authorise this transfer as a charitable donation to the Heritage Park Society. I agree that Heritage Park, or its agent, may contact my broker for the purpose of concluding this transaction.

Signature of Donor/Client

Date

