

# Gifts of Publicly Listed Securities Share Transfer Form

## Donor

Name: \_\_\_\_\_

Address: \_\_\_\_\_

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

Daytime Phone Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

## Donor's Account

Financial Institution: \_\_\_\_\_ Account Number: \_\_\_\_\_

Name of Financial Advisor: \_\_\_\_\_ Contact Phone Number: \_\_\_\_\_

## Donation

Name of Security: \_\_\_\_\_ Quantity: \_\_\_\_\_ CUSIP/ISN: \_\_\_\_\_

Name of Security: \_\_\_\_\_ Quantity: \_\_\_\_\_ CUSIP/ISN: \_\_\_\_\_

Allocation of Donation (optional): \_\_\_\_\_

I understand that I will receive a gift-in-kind tax receipt for these securities from Habitat Acquisition Trust for the closing price on the date these securities are received in the charity's account. These securities have been donated to Habitat Acquisition Trust without restriction and can be sold by the charity at their discretion.

*Signature of Donor:* \_\_\_\_\_

*Date:* \_\_\_\_\_

## Habitat Acquisition Trust

Receiving Firm: **iA Private Wealth Inc.**  
**Dealer/Rep: 7923/SBW1 FINS: T089 DTC #: 5008**  
**CUID: NBCS CLEARSTREAM: 37220**  
**37B4ZXA**  
Account Number: \_\_\_\_\_  
Name of Account: Habitat Acquisition Trust  
Charitable Registration Number: 889626545 RR0001

*A checklist for your reference:*

- Please call Habitat Acquisition Trust **prior to initiating the transfer of securities**, to ensure that your gift is handled smoothly and efficiently. **780-952-4772**
- Notify your financial advisor of your intention to make a gift of securities.
- Give your financial advisor authorization to initiate the transfer on your behalf. This form, completed and signed, should be sufficient for authorization.
- Email a copy of this signed form to [donations@iaprivatewealth.ca](mailto:donations@iaprivatewealth.ca)**  
If you have any questions please call Frank Arnold's assistant, Lori Woytowich at (250) 383-4178.

**Thank you for your generous support of Habitat Acquisition Trust!**

Habitat Acquisition Trust  
PO Box 8552 Stn Central, Victoria, BC V8W 3S2

Phone: 780-952-4772  
Email: [Kevin@hat.bc.ca](mailto:Kevin@hat.bc.ca)