Donation of Publicly Traded Securities to
Unitarian House of Ottawa

Thank you for your gift of securities. Transferring securities (stock, bonds, mutual funds) is simple and may result in tax saving for you.

1. Donor Information

Name _____

Address _____

City _____ Prov. _____ Postal Code _____

Phone _____ Email _____

2. Donor's Investment Advisor/Firm

Company Name _____

Advisor Name _____

City _____ Prov. _____ Postal Code _____

Phone _____ Email _____

Fax _____

3. Securities to be Transferred

From your Delivering Investment Account # _____

_____ Shares of _____
# of shares

_____ Shares of _____
# of shares

_____ Shares of _____
# of shares

4. Transfer Securities in Kind to:

Unitarian House of Ottawa: 500-09673-22

CIBC World Markets Inc. (Receiving Investment Firm)

Dealer Code: 9280 FINS # T079 CUID: WGDB

DTC: 5030 EUROCLEAR #10034 Rep Code: CS6

I authorize this transfer as a charitable donation to the Unitarian House of Ottawa. I agree that the Unitarian House of Ottawa, or its agent, may contact my broker for the purpose of concluding this transaction.

_____ _____

Signature of Donor/ Client Date

Signature to be verified by the Donor's Investment Advisor

Unitarian House of Ottawa

1. **Complete and sign this form.** Please print legibly. This information is needed for the transfer, tracking and receipting

2. **Give the completed original signed form to your broker**. Your broker will arrange for the transfer of shares to Unitarian House of Ottawa *(Unitarian House of Ottawa or its brokers cannot initiate the transfer on your behalf)*. If you do not have a broker, fax this form directly to your investment firm. *Kindly make a special note on this form, if your securities are being held "Client Name".*

3. **Send a copy of the completed original signed form to our broker** (or ask your broker to do this)
CIBC World Markets Inc.
Andrew Czernik
Phone: 613-783-7884
Fax: 613-239-2917
E-mail: andrew.czernik@cibc.ca

4. **Send a copy of the completed original signed form to** (or ask your broker to do this).
E-mail:
jbrierley@unitarianhouse.ca
Subject: Donation in Kind

Your Charitable Tax receipt

• The value of your donation is based on the closing price of the shares on the day the shares are received by Unitarian House of Ottawa, **CIBC World Markets Inc.**