



United Way
Sarnia-Lambton
theunitedway.on.ca

Gift of Securities Transfer Form

Donor Information

First Name: _____

Initial: _____

Surname: _____

Address: _____

Phone or e-mail: _____

Financial Advisor: _____

Phone: _____

Delivering Institution: _____ Account # _____

United Way Information

United Way of Sarnia-Lambton
PO Box 548, Sarnia, ON, N7T 7J4

Broker Name: NBCN

**Money Mgr:* Assante Capital Mgt. Ltd.
15 York Street, 7th Floor,
Toronto, ON M5J 0A3

Broker CUID: ASNA

Broker Acct. No.: 2ENNR6A

**Nominee Acct. No.:* 91794884NO

(* = needed if gift is a Mutual Fund)

Transfer Information

Security Name: _____

Exchange Name: _____

Approximate Value of each share: \$ _____

Number of shares to be transferred: _____

Approximate value of donation: \$ _____

Requested transfer date: _____

Signature of Donor

Date

1 Copy to United Way of Sarnia-Lambton for Tax Receipt Purposes (Fax 383-6032 or Phone 336-5452)
1 Copy to Donor's Broker to request transfer