



How to Make a Gift of Securities Information Sheet and Transfer Form

Overview

The following steps will help you quickly and easily donate a gift of securities to Armagh:

1. **Complete a “Letter of Authorization from Donor to Broker”** (i.e., “the transfer form”). This form is your instruction to your broker to transfer securities to Armagh. A copy of this form is on Page 2 of this document.
2. **Complete all sections of the transfer form**, especially the CUSIP # (i.e., the Committee on Uniform Securities Identification Procedures Number, which is provided by your broker/investment advisor and acts like a transaction number in case the transfer needs to be tracked by your broker). For privacy reasons, your broker can’t disclose your name to Armagh, so please be sure to include all Donor/Client Information requested, including your daytime phone number.
3. **Fax or send the completed transfer form to your broker or investment advisor** who will initiate and be responsible for the transfer. Please note that sending the form by mail will delay the start of the transfer process and may affect the ultimate receipt value. Please call Lynn Ward, Executive Director of Armagh at 905-855-0299 ext. 23 if you’re sending the transfer form by mail.
4. **Please notify Armagh** by returning a copy of the completed transfer form to our office. This is important because securities are transferred into Armagh’s account on an anonymous basis. Notifying Armagh will also ensure you receive our thanks, any appropriate recognition and your official receipt for income tax purposes. Transfer forms may be faxed to Lynn Ward, Executive Director of Armagh at 905-855-3189 or mailed to Lynn Ward’s attention at Armagh, PO Box 52581, 1801 Lakeshore Road West, Mississauga, Ontario, L5J 4S6.

Additional Information

Your tax receipt will be valued based on the closing price on the day when the shares are legally transferred to Armagh’s account at our custodial agent, _____ [Armagh’s financial institution handling securities]. (Note: Shares are considered legally transferred only when delivery is confirmed by Armagh’s custodial agent.) Armagh’s policy for the sale of donated securities is that all shares will be sold as soon as possible after they’ve been received.

If you have any questions, please call Lynn Ward, Executive Director at Armagh at 905-855-0299 ext. 23 or email lynn.armagh@rogers.com. Thank you.



Gift of Marketable Securities Letter of Authorization from Donor to Broker

To transfer securities to Armagh, please complete this form and fax or send a copy to your Broker. Please also fax or send a copy of this form to Armagh so we can track your donation and send you a tax receipt, as follows:

- By Fax to: 905-855-3189, attention Lynn Ward, Executive Director of Armagh
- By Email to: lynn.armagh@rogers.com
- By Mail to: Lynn Ward, Executive Director, Armagh, PO Box 52581, 1801 Lakeshore Road West, Mississauga, Ontario, L5J 4S6

Note: If you plan to donate securities that are thinly traded, highly volatile or not easily liquidated, please call Lynn Ward at 905-855-0299 ext. 23 before initiating a transfer. All transfers of securities to Armagh are subject to review, approval and acceptance by Armagh. Your tax receipt will be valued as per applicable Canada Revenue Agency guidelines. Thank you for your generous support of Armagh!

A. Donor Information

Name of Donor _____
Street/Mailing Address _____
City/Province/Postal Code _____
Phone # Day _____ Evening _____ Fax _____
Email _____

B. Information About Your Broker

Name of Broker _____
Brokerage Company and Account # _____
Financial Institution _____
Phone # Day _____ Fax _____
Email _____

C. Description of Your Securities to be Donated

Name of Security _____
Number of shares (or face value of the bonds or coupons) _____
Description of securities (e.g. common, preferred, debentures, etc.) _____
CUSIP # _____ Expected Date of Transfer to Armagh: _____

Donor's Signature (Required) _____ Date _____

D. Account Information for Armagh

Please instruct your broker to transfer the securities to:

- Receiving Institution: [Name and address of Armagh's receiving institution]
- Client Service Representative: [Receiving institution's contact person]
- Phone: [Receiving institution's phone number]
- Fax: [Receiving institution's fax number]
- FIN #: [FIN #]
- Armagh Investment Account: [Armagh's account number]