Rotary Halifax Harbour | Rotary Club of Halifax Charitable Trust

Donation of Publicly Traded Securities to Rotary Club of Halifax Charitable Trust

Donor's Information

▲Name

▲Street Address

▲City ▲Province ▲Postal Code

▲Phone ▲Email

How would you like to receive your tax receipt?
Select all that apply: ☐ Mail ☐ Email

Donor's Broker Information

▲Company Name ▲Broker Name

▲Street Address

▲City ▲Province ▲Postal Code

▲Phone ▲Fax ▲Email

Securities to be Transferred

shares of

# of shares name of security

shares of

# of shares name of security

I authorize this transfer in-kind as a charitable donation to Rotary Club of Halifax Charitable Trust.

Signature Date

Rotary Club of Halifax Charitable Trust is a registered charity with the Canada Revenue Agency (119124840 RR 0001). Thank you for donating securities to Rotary Club of Halifax Charitable Trust. If you have any questions please reach out to us: trust@rotaryhalifaxharbour.ca.

Instructions

1. **Complete and sign this form.** You may fill it out on your computer before printing, or print it first and complete it by hand.

2. **Give this completed and signed form to your broker.**

3. **Ensure our brokerage receives a copy.** You may send it directly, or ask your broker to send it on your behalf:

CIBC Wood Gundy
Malloy Investment Group
1969 Upper Water Street
Suite 1801
Halifax NS B3J 3R7
andrew.malloy@cibc.com

Ph: 902-460-3704
Fax: 902-429-8323

4. **Send a copy to us as well, or ask your broker to do so.** We require this copy to issue your tax receipt.

trust@rotaryhalifaxharbour.ca

P.O. Box 9193
Halifax, NS, B3K 5M5
CANADA

Our Account Information
Brokerage Acct # 27101783-16
FINS # T079
CUID/DCS: WGDB
DTS: 5030

A note about our name: The Rotary Club of Halifax Charitable Trust was originally created and managed by the former Rotary Club of Halifax. When that club merged with the Rotary Club of Halifax Harbourside in 2021, the Charitable Trust continued operating under its original name.