



**OUTWARD BOUND  
CANADA**

## Three easy steps to make a stock donation that changes lives.

### **Step 1:**

**Please complete all sections of the securities transfer form attached.**

For privacy reasons, your broker cannot disclose your name to us, so please complete the Donor Information section, including your daytime phone number with area code. Your advisor/broker will provide the CUSIP # which acts like a transaction number in case the transfer needs to be tracked.

### **Step 2:**

**Send a copy of the completed transfer form to Outward Bound Canada for processing.**

This step is important because securities are transferred into our account anonymously, without your name listed. Notifying us will ensure you receive your official receipt for income tax purposes.

### **Outward Bound Canada**

Email: [giving@outwardbound.ca](mailto:giving@outwardbound.ca) • Phone: 1-888-688-9273 • Fax: 1-866-328-9761  
2200 Yonge Street, Suite 910 • Toronto • Ontario • M4S 2C6

### **Step 3:**

**Fax or send the completed transfer form to your broker or investment advisor.**

Your broker or investment advisor is responsible for initiating the transfer.

**Additional Information:** Shares/stocks are considered legally transferred only when our custodial agent confirms delivery. Your receipt will be valued based on the closing price on the day when the shares are legally transferred to Outward Bound Canada's account at our custodial agent 3mac, a division of Raymond James Ltd. Outward Bound Canada's policy for the sale of donated securities is to sell the shares as soon as possible after they have been received.



## OUTWARD BOUND CANADA

Please send a copy of the completed form before proceeding with your securities transfer to:

### Outward Bound Canada Foundation

If you have any questions regarding this form, please contact:

[giving@outwardbound.ca](mailto:giving@outwardbound.ca)

Outward Bound Canada Foundation

Phone: 1-888-688-9273

Fax: 1-866-328-9761

Outward Bound Canada  
2200 Yonge St Suite 910  
Toronto, ON M4S 2C6

# Securities Transfer Form

## Donor Information (required for tax receipting purposes)

The stock will be valued at the closing price on the date it is received in the Outward Bound brokerage account.

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

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

City: \_\_\_\_\_ Prov: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_

## Broker Information

Company Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

Transfer securities from:

Account #: \_\_\_\_\_

## Securities to be donated:

Security Name	# of unts/shares	CUSIP#/symbol

Security Name	# of unts/shares	CUSIP#/symbol

I authorize Outward Bound Canada, or its agent, to contact my broker for the purposes of concluding this transaction.

Signature \_\_\_\_\_

Date \_\_\_\_\_

## Transfer securities to:

**3Mac, a division of Raymond James Ltd.**

**CUID: MSLT**

**A/C: 1L5-U10E-0 (Cdn) or A/C: 1L5-U10F-0 (US)**

**Portfolio Manager: Diane Stoneman**

**416-597-7913**

**1-800-461-3485**

[dstoneman@3mac.com](mailto:dstoneman@3mac.com)