

# Alzheimer Society

BRITISH COLUMBIA

## PUBLICLY TRADED SECURITIES ~ DONATION PROCESS ~

### PROCESS:

- Step 1:** Contact Yolanda Bouwman at the **Alzheimer Society of B.C. at 604-681-6530 or 1-800-667-3742** to inform us of your intention to give a gift of securities
- Step 2:** Instruct your broker to transfer the stock to the Alzheimer Society of B.C. care of **Michael Fahy, Scotia MacLeod, telephone 604-737-3523**
- Step 3:** Please **fax this form** with the completed information below to  
Alzheimer Society of B.C.  
Attention: Yolanda Bouwman  
**Fax # 604-669-6907**

### INFORMATION REQUIRED:

**Name of shares:** \_\_\_\_\_

**Number of shares:** \_\_\_\_\_

**Approx. value of shares:** \_\_\_\_\_

**Date of transfer to Alzheimer Society of B.C. investment acct.:** \_\_\_\_\_

**Name of Financial Advisor:** \_\_\_\_\_

**Contact #s for Financial Advisor:** Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

***Note:** The fair market value is determined on the date the securities are received by the charity (i.e. the date of transfer to Alzheimer Society of B.C.'s investment account) and a charitable receipt is issued for the value on the closing day of transfer to our account.*

### Confirm the name and address for receipt:

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

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

**Telephone:** \_\_\_\_\_

### For office use only

Value on settlement date \_\_\_\_\_ Tax receipt amount \_\_\_\_\_

Authorized signature \_\_\_\_\_

Director of Finance and Administration