



How to Donate Securities

Step 1

Complete all sections of the securities transfer form on the following page.

Due to privacy laws, your broker cannot disclose your name to us. Please complete the Donor Information section in order to receive a donation receipt.

Step 2

Send a copy of your completed transfer form to Ally Global Foundation for processing.

This allows us to track your name and donation details for receipting at year end. We value every gift and want to provide you with an accurate tax receipt and appropriate recognition of your donation.

Send to:

Nikki Routley, VP of Operations
nikki@ally.org

Step 3

Send your completed transfer form to your broker or investment advisor.

Your broker or investment advisor will then initiate the transfer.

Please Note: The securities are legally transferred when our custodial agent confirms delivery. The securities will be valued at the closing price on the date it is received in the Ally Global Foundation brokerage account.



Securities Transfer Form

Donor Information (Required for tax receipting purposes.)

Name _____

Address _____

City _____ Province _____ Postal Code _____

Phone # _____ Email _____

Broker Information

Company Name _____ Contact Name _____

Phone Number _____ Email _____

Transfer Securities from:

Account # _____

Securities to be Donated _____

Security Name _____ Number of Units _____ CUSIP #/Symbol _____

Security Name _____ Number of Units _____ CUSIP #/Symbol _____

I authorize Ally Global Foundation, or its agent, to contact my broker for the purposes of this transaction.

Signature _____ Date _____

Transfer Securities to:

RBC Dominion Securities Inc.

Attn: Andrew Konnert or Erin Ayden at Campeau Konnert Financial Management

andrew.konnert@rbc.com | erin.ayden@rbc.com

Dealer Code: 9190 Rep Code: SCP

CUID#: DOMA DTC#: 5002 EUROCLEAR#: 90065 Account#: 802-05771-13

Once the donation is initiated, please email this form to Erin Ayden at erin.ayden@rbc.com. Should you require any assistance for the transfer, please contact Andrew Konnert or his team at (604) 257-7645. In the absence of notifying RBC Dominion Securities of your donation by providing a copy of this form, proper receipt, sale and credit of your donation cannot be guaranteed. Physical delivery of securities will not be accepted.

