



## Gifts of Securities to Montcrest School

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### To be completed by the Donor (or their broker):

Please be advised that the following transfer or deposit is about to be made to Montcrest School's custodial account with TD Direct Investing. Ownership of the account is assigned to Montcrest School. The amount of the donation will be valued on the close of business the day the transfer or deposit is made and the tax receipt will reflect this value.

Transfer to **Montcrest School Account #761W56A** at **TD Direct Investing: 1-800-4655463**. If stock is Canadian and held in either a brokerage account or in certificate form, please note the following information for transfers:

**DEALER CODE: 9265 FINS: 0007 DTC: 5036 CUID: GIST**

Canada Revenue Agency (CRA) Charity Registration # -'Montcrest School' 11904 4741 RR0001

Name of Donor: \_\_\_\_\_ Daytime Phone: \_\_\_\_\_

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

Name of Broker: \_\_\_\_\_ Firm: \_\_\_\_\_

Broker's Phone: \_\_\_\_\_ Transfer / Deposit Date: \_\_\_\_\_

Name of Security: \_\_\_\_\_ Number of Shares: \_\_\_\_\_

Where Traded: \_\_\_\_\_ CUSIP No: \_\_\_\_\_

Description of Shares: \_\_\_\_\_

*(e.g. common, preferred, mutual fund units, Class A etc.)*

Please direct this gift to :  
 The Montcrest Initiatives Fund  
 The Elaine Danson Bursary Fund  
 The Taber Family Bursary Fund  
 The Grade 8 Legacy Gift  
 The Community Garden Project

**Signature of Donor:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*By this signature, I hereby instruct my broker to make the transfer or deposit to Montcrest School's account.*

### Instructions to donor / donor's broker:

1. The donor's broker should contact TD Direct Investing at 1-800-465-5463 to notify them of the intended action (press 4 to access the options 'to place a trade').
2. Please FAX a copy of this completed form to the TD Direct Investing's Back Office at 1-877-639-4547.
3. In addition, please forward a copy of this completed form to Montcrest:

Attn: Dawn Marshall, Head, Finance and School Operations  
[dmarshall@montcrest.ca](mailto:dmarshall@montcrest.ca) - 416 469 2008 ext. 5155

For further assistance, please contact Natalie Hollinshead, Head, Community Relations  
[nhollinshead@montcrest.ca](mailto:nhollinshead@montcrest.ca) - 416 469 2008 x5178

***Thank you for your support!***