



## Gifts of Publicly Traded Securities and Mutual Funds Guidelines for Transferring Assets

Thank you for your consideration in gifting publicly traded mutual funds, stocks or other securities to the ALS Society of British Columbia. The following will help ensure your generosity is efficiently welcomed:

1. Complete and sign the society's **Gifts of Publicly Traded Securities Transfer Intent Form** (Your broker or investment firm will be able to provide the numbers and symbols requested and clarify if any special circumstances might delay your donation).
2. Submit the completed **Gifts of Publicly Traded Securities Transfer Intent Form**, with one copy to your broker and one copy to the ALS Society of BC to the attention of **Rena Mendoza**
  - By fax - 604-278-4257
  - By email - donor-relations@alsbc.ca
  - By mail - ALS Society of BC #1233 – 13351 Commerce Parkway Richmond, BC V6V 2X7

### **Please note:**

- Your transfer will be initiated within 24 hours of receipt and can take between three and ten business days to complete, depending on the security involved or other circumstances.
- Your institution may reject the transfer for a number of reasons, which are usually related to incomplete instructions. Please ensure that the **Gifts of Publicly Traded Securities Transfer Intent Form** is clear and complete.
- Some products are non-transferable or non-redeemable and, therefore, you might be unable to donate them. If you are uncertain, please ask your advisor.
- Please be advised that the value of the donation receipt will be based on the closing price of the securities on the day that they are received in our account, in accordance with our policy and Canada Revenue Agency (CRA) regulation.

For further information, you may contact Rena Mendoza, Manager of Donor Relations & Finance, at 1-800-708-3228 ext. 225 or via email at donor-relations@alsbc.ca.

# Gifts of Publicly-Traded Securities Transfer Intent Form

<b>DELIVERING INSTITUTION:</b>	
Name:	
Address:	
Contact Name:	
Telephone:	Email:
<b>DONOR/TRANSFEROR INFORMATION:</b>	
Account Number:	
Name of Donor:	
Address:	
Telephone:	Email:
<b>RECEIVING INSTITUTION:</b> Credential Qtrade Securities Inc.	
<b>Address:</b> 700-1111 W. Georgia Street, Vancouver, BC V6E 4T6	
<b>Contact:</b> Diane Pais Camille Li	<b>Email:</b> <a href="mailto:dpais@aviso.ca">dpais@aviso.ca</a> <a href="mailto:cli@aviso.ca">cli@aviso.ca</a>
<b>Phone:</b> 604-742-8217 604-742-2918	
<b>Account Name:</b> Amyotrophic Lateral Sclerosis Society of BC	
<b>Account Number:</b> 506526A1 <b>Dealer Code:</b> 7799 <b>Rep Code:</b> 5TLB	
<b>For Canadian Stocks:</b> CUID-CRED	<b>For US \$ Stocks:</b> DTC 5083
<b>Charitable Number:</b> 106708985 RR0001	

**This form will confirm my intention to donate the following securities to the ALS Society of BC without restriction and which can be sold by the ALS Society of BC at any time deemed appropriate.**

Security Description:	# of Shares/Unit	CUSIP or Symbol

\_\_\_\_\_  
**Donor/Transferor Signature**

\_\_\_\_\_  
**Date Signed**