



SUNSET
COMMUNITY
FOUNDATION

FOR GOOD. FOREVER.

GIFT OF SECURITIES – TRANSFER AUTHORIZATION FORM

1. DONOR INFORMATION

Name(s): _____

Address: _____

Phone: _____

Email: _____

Donor Direction to SCF - Charity & Amount to each (attach extra sheet if you require more space below):

2. SECURITIES TRANSFER AUTHORIZATION (contact your broker for assistance)

Name of Brokerage Firm: _____

Brokers Name & Transit: _____

Brokers Phone & Email: _____

Account Number: _____

Name & Symbol of Security: _____

Number of Units/Shares: _____

3. SUNSET COMMUNITY FOUNDATION'S BROKERAGE ACCOUNT AT IG PRIVATE WEALTH MANAGEMENT:

Contact Name: Attn: Cash Management Operations – Dept. 147
Address: IG Wealth Management
447 Portage Ave, Winnipeg, MB R3B 3H5
Email: aleta.macgregor@igpwm.ca
Telephone: 519-432-6768 Extension 8
Fax: 519-432-1785
Account: 240225169
DTC: 5008 CUID: NBCS

4. DONOR AUTHORIZATION

DONOR SIGNATURE: _____

DONOR SIGNATURE: _____

DATE: _____

THE PROCESS

1. Forward the completed Transfer Authorization Form **to your broker to initiate transfer**. Please note, SCF cannot initiate this transfer on your behalf.

2. Forward a copy of the completed form to:

IG Private Wealth
Attn: Aleta MacGregor
aleta.macgregor@igpwm.ca or by fax to
519-432-1785 **AND** email to
SCF at
lisa@sunsetcommunityfoundation.ca
(along with your extra list of charity choices if applicable)

3. The value of the charitable receipt will be based on the price the securities are sold for in the brokerage account.

4. Upon receiving this transfer, IG Private Wealth will contact the SCF and will advise of the details of the transfer.

5. The SCF will contact the donor and issue a Tax Receipt within 60 days.

6. The Sunset Community Foundation Charitable Registration Number: 86536 8526 RR0001

7. Please contact the Sunset Community Foundation regarding Estate Gifts
lisa@sunsetcommunityfoundation.ca

