

# Gift of Securities – Transfer Authorization Form

## 1. Donor Information

Name: \_\_\_\_\_  
Phone number: \_\_\_\_\_  
Address: \_\_\_\_\_  
Email: \_\_\_\_\_  
 CMHATV Highest Needs  
 CMHATV Rural  
Fund:  My Sisters' Place  
 Addiction Services  
 Oxford County

## 2. Donor's Broker Information

Institution Name: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Firm: \_\_\_\_\_  
Name of Security: \_\_\_\_\_  
# of Units: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Approximate value of each unit: \$ \_\_\_\_\_  
Approximate total value of donation: \$ \_\_\_\_\_  
Date of Transfer to CMHATV's account: \_\_\_\_\_

## 3. Canadian Mental Health Association Thames Valley (will be displayed as "WOTCH") Brokerage Account at TD Direct Investing

Contact name: TD Direct Investing  
Branch: Tower 2, 2<sup>nd</sup> Floor, 3500 Steeles Ave E  
Markham, ON L3R 0X1  
Telephone: 1-800-465-5463  
  
Account No: 484X33A  
CUID: GIST

## 4. Donor Authorization

\_\_\_\_\_  
Donor signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Donor signature

\_\_\_\_\_  
Date

*Due to the cost of processing securities trades, we respectfully request a minimum  
Fair Market Value donation of \$1,000.*

*CMHA Thames Valley Addiction and Mental Health Services charitable registration  
number: 118834217 RR 0001*

## Instructions

1. **Complete** this Gift of Securities Transfer Authorization form. Your broker can assist you.
2. **Contact us** - your broker will advise us of the securities donation and we've provided our broker's information. If you have any questions you can contact **Wendy Sanderson** at **519.668.0624 ext. 1008**
3. **Authorization** - simply sign to authorize the transfer of securities to CMHATV Addiction and Mental Health Services. Your broker will initiate the transfer to our account.
4. **Scan** - have your broker scan this form and email a pdf of this form to:  
**CMHATV:**  
**securities@cmhatv.ca**
5. **Confirmation** - Once the security is received in our account, we will confirm with you. The value of the charitable receipt is determined by the closing price on the day we receive the securities in our account.