



## Gift of Marketable Securities Confirmation Form

Please see page two of this form for four easy steps to give a gift of securities.

To make a donation of securities, please fill out this form and return it to Tafelmusik in one of the following ways:

**By email:** jcowans@tafelmusik.org

**By mail:** see instructions on page two

Full Name of Donor: \_\_\_\_\_

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

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

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

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

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Date of Transfer: \_\_\_\_\_

Name of Security: \_\_\_\_\_

Where Traded: \_\_\_\_\_ Securities Number: \_\_\_\_\_

Description of Shares (i.e. common, preferred): \_\_\_\_\_

Quantity of Shares: \_\_\_\_\_ Approximate Unit Value: \_\_\_\_\_

Designation of Gift for Tafelmusik:

☐ Tafelmusik to designate donation based on need

OR

Specific Fund: ☐ Annual/Membership ☐ Artist Training ☐ Endowment  
☐ Other: \_\_\_\_\_

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

*By this signature I hereby instruct my broker to effect the transfer proposed above upon confirmation by Tafelmusik.*



Thank you for your gift! To ensure a smooth transaction:

1. Please complete (or have your broker complete) all sections of this form. Contact **Jenna Cowans, Development Manager**, at 1 (833) 964-6337 ex. 244 or jcowans@tafelmusik.org to inform that you are making a Gift of Securities.
2. Return a copy of this completed form to Tafelmusik Baroque Orchestra and Chamber Choir, to ensure you receive your official receipt for income tax purposes. Forms can be sent by email to jcowans@tafelmusik.org or sent by mail to:

Tafelmusik Baroque Orchestra and Chamber Choir  
427 Bloor Street West, Box 14  
Toronto, Ontario M5S 1X7

3. The marketable securities/shares will need to be transferred to Tafelmusik's financial advisor. Please advise your broker to contact our financial advisor, as listed below, to enact the transaction:

Account #: 411-21979-10  
Account name: Tafelmusik  
FINS #: T002  
CUID: DOMA  
Rep code: J66 – Gary Ursell  
RBC Dominion Securities Inc.

Associate, Annie Zhen, Gary Ursell Investment Advisory Team:  
Email: annie.zhen@rbc.com  
Tel: (416) 842-3682  
Fax: (416) 842-3542

4. A charitable tax receipt will be issued based on the end-of-day trading price on the day the securities are received by our financial advisor. (Note: Shares are considered legally transferred only when delivery is confirmed by our custodial agent.)

**Thank you for your generous support!**