



Gift of Publicly Traded Securities

A Tax-Smart Way to Support Tafelmusik

Securities are one of the most efficient ways to make a gift to Tafelmusik.

You can give now, or as part of your estate and will planning. Thank you for your generous support of Tafelmusik—your gift sustains our concerts, education and artist training program!

Consult with your investment advisor to decide which investments make the most financial and philanthropic impact for you. Once you know which securities you'd like to donate, please complete this form. Your broker and/or investment advisor will work with our broker to complete the transfer process. Once the transfer is complete, we will sell the shares promptly and issue a charitable tax receipt, if applicable, for the value of the shares.

Please be advised that the value of the donation will be based on the closing price of the security, on the day the securities are received by Tafelmusik's broker.

Charitable Registration Number: 11920 8320 RR0001

The Process Is Simple

- 1. Complete this form (see page 2)**
and send it to Tafelmusik before initiating the transfer by email to Erin Maxfield, Senior Development Officer, at emaxfield@tafelmusik.org
- 2. Instruct your broker**
to transfer your securities to Tafelmusik's brokerage account:

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

Contact: Annie Zhen, Associate,
Gary Ursell Investment Advisory Team
Tel: 416-842-3682
Fax: 416-842-3542
Email: annie.zhen@rbc.com
- 3. A charitable tax receipt will be issued**
for the closing price of the securities on the date they are received in Tafelmusik's account.
- 4. To be eligible for the tax receipt**
for the current year, the securities must be received by 5:00 p.m. on December 31 of that year.
- 5. Please email the form to**
Erin Maxfield at emaxfield@tafelmusik.org
or mail it to:
Tafelmusik, Trinity-St. Paul's Centre,
427 Bloor Street West, Box 14
Toronto, ON M5S 1X7



Gift of Securities Donation Form

Donor Information:

Full Name of Donor:			
Address:			
City:			
Province:		Postal Code:	
Phone:			
Email:			

Broker Information:

Broker Name:	
Firm Name:	
Phone:	

Gift Details:

Name of Security:	
Number of Shares:	
Description:	
Approximate Value: \$	
Expected Transfer Date:	
Where Traded:	
Designation of Gift (choose one):	
☐ Tafelmusik to designate based on need	
☐ Annual Fund	
☐ Artist Training (TBSI)	
☐ Education & Outreach	
☐ Other (please specify):	

Authorization:

By signing below, I authorize my broker to transfer the securities described above to Tafelmusik's account.

Signature of Donor:	
Date:	