

Letter of Direction for Transfer of Publicly Traded Securities or Mutual Funds Units



DONOR INFORMATION

Name: _____

Address: _____

Phone: _____ Email: _____

Gift Designation (select tick box):

- ☐ Area of Highest Priority Need
☐ Other: _____

INVESTMENT FIRM INFORMATION

Investment Firm: _____

Advisor Name: _____

Advisor Phone: _____

Investment Account Number: _____

Account Name: _____

SECURITIES TO BE TRANSFERRED:

Name of security(s): _____

Number of shares: _____

Description and class: _____

CUSIP: _____ Currency: _____

Transferring Institution FIN's / CUID or DTC Number: _____

TRANSFER SECURITIES IN KIND TO:

For Securities Transfer Agencies:

CUID: BNSC

FINS: T525

DTC: 4816

For In-Kind Mutual Fund donations:

Intermediary Code: BNSG

Dealer Number: 9155

Rep Code: RCC

Account Number: 7806520818

I authorize this transfer to BC Lions Society for Children with Disabilities account held at:

Scotiabank

Portfolio Manager: Kathy Chung

650 West Georgia Street, Suite 510, Vancouver, BC V6B 4N7

For the benefit of BC Lions Society for Children with Disabilities, Registered Charity: 119217248 RR0001

Donor Signature: _____ Date: _____

Please return this completed form directly to:

Tristan Klassen, Vice President Philanthropy | tklassen@eastersealsbcy.ca | c: 604.619.8442

3981 Oak Street, Vancouver, BC V6H 4H5 | 604.873.1865

*Easter Seals BCY is a service of the BC Lions Society for Children with Disabilities.