



Toronto Foundation for Student Success

GIFT OF SECURITIES TRANSFER FORM

Thank you for donating a gift of securities to the Toronto Foundation for Student Success (TFSS).

There are two main steps in donating a gift of securities:

1. Instruct your broker to transfer the securities to TFSS' brokerage account (listed below)
2. Return this **Securities Transfer Information Form** to TFSS by mail or email

Toronto Foundation for Student Success

Attn: Daisy Chan, Director of Finance
2 Trethewey Drive, 4th Floor
Toronto, Ontario M6M 4A8

Phone: (416) 394-6883
Email: daisychan@tfss.ca
Charitable Registration #88903 6455 RR0001

DONOR INFORMATION

First Name _____ Last Name _____

Mailing Address _____

City _____ Province _____ Postal Code _____

Phone _____ Email _____

BROKER DETAILS

Broker's Name _____ Financial Institution _____

Mailing Address _____

City _____ Province _____ Postal Code _____

Phone _____ Email _____

DESCRIPTION OF SECURITIES

Name of Securities _____ Quantity _____ Date of Transfer _____

Name of Securities _____ Quantity _____ Date of Transfer _____

Name of Securities _____ Quantity _____ Date of Transfer _____

DESIGNATION

General Funds Specific Program _____

TO TRANSFER SECURITIES, ADVISE YOUR BROKER OF THE FOLLOWING DETAILS

CIBC Wood Gundy, Jay Smith

Attention: Mate Petrovic
Phone: (416) 313-0480
Fax: (416) 594-8916
200 King Street W., Suite 1807
Toronto, Ontario M5H 3T4

Toronto Foundation for Student Success
Account #533-14864
CUID#: WGDB
FINS#: T079
DTC#: 5030

Please note:

- Shares / stocks are considered legally transferred only when TFSS' brokerage account confirms delivery.
- A charitable donation receipt will be issued based on the fair market value of the securities on the closing date of the securities are received into TFSS' brokerage account.

Donor Signature _____ **Date (dd/mmm/yyyy)** _____