

GIFT OF PUBLICLY TRADED SECURITIES Transfer Intent Form

STEP 1: Prior to securities transfer, please fax or email this form to:

Fawad Iqbal

Senior Manager – Partnerships

Kinvia

901-2 Lansing Square | Toronto | ON | M2J 4P8

Phone: 416-757-1220 ext 245 | **Cell:** 416-558-2871

Toll Free: 1-800-387-1220 | **Fax:** 416-757-3318

E-mail: FIqbal@kinvia.ca

STEP 2: Donor Information – (Name of donor for charitable receipting)

Name: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Phone: _____ Email: _____

Gifts of \$1,000 or more are acknowledged in our Annual Report.

Please indicate if you prefer to remain anonymous. ☐

STEP 3: Notification of Intent

This letter will confirm my intention to donate the following securities to Kinvia without restriction and which can be sold by Kinvia at any time it considers appropriate.

Name of shares: _____

Number of shares: _____

Account Number: _____

Authorizing Signature: _____ Date: _____

STEP 4: Your Broker/Delivering Custodian Information:

Name of Firm: _____

Broker's Name: _____

Phone: _____ Email: _____

STEP 5: Kinvia's Broker Information

To electronically transfer securities, please provide your broker with the following:

Name of Account:	Kinvia
Institution:	CIBC Wood Gundy
Rep Code:	CT9
Transit/Dealer Code:	9280
Account Number:	426-50056-13
Broker Contact Name:	Rory Tufford
Email:	rory.tufford@cibc.ca
Phone:	(416)594-8949
Toll Free:	1-800-387-1865
Fax:	(416)369-8987
For Canadian \$ Stocks:	DCS CUID # WGDB
For US \$ Stocks:	DTC # 5030
Charitable Registration #:	11883 0983 RR0001

You will receive a Gift-in-Kind charitable tax receipt through the mail recognizing the value of your donation.

***Please be advised that the value of the donation receipt will be based on the closing price of the securities on the day that they are received into our account in accordance with our policy and Canada Revenue Agency (CRA) regulations.**

Please Seek Expert Advice:

Kinvia strongly recommends that you seek professional advice to ensure your financial goals are considered, your tax situation reviewed, and your planned gift is tailored to your circumstances. For further information and sample Will bequest clauses, please contact Fawad Iqbal – *Senior Manager Partnerships*, at fiqbal@kinvia.ca

Gift Notification

Notifying us of your gift allows us to thank you personally, plan for future programs and projects that impact children around the world.

***Thank you for assisting us in our quest to create a world in which children thrive,
free from poverty by considering making a planned gift to Kinvia.
We cannot achieve this vision without you!***

Name: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Date of Birth: _____ Telephone: _____

Email: _____

Type of Gift

Yes, I have made provision for Kinvia and you may note my file as follows:

- ☐ Outright bequest in my Will \$ _____
- ☐ % of my estate in my Will _____ %
- ☐ Trust under my Will with Kinvia as the final beneficiary
- ☐ Publicly Traded Securities and/or Mutual Funds approx. \$ _____
- ☐ Registered Assets – RRSP or RRIF approx. \$ _____
- ☐ Life Insurance Policy approx. \$ _____
- ☐ Other _____

Recognition

☐ **Yes**, I would like to be recognized for my gift, allowing other donors to understand how making such a gift can help children throughout the world.

☐ **No thank you**, I would not like any type of recognition, and I would prefer my gift to remain private.

Date: _____ Signature: _____