

# In-Kind Donation of Stocks, Mutual Funds (Publicly Listed Securities)

## IMPORTANT INFORMATION

- Please use this form to transfer Publicly Listed Securities (PLS) to Abundance Canada (CRA registration # 129253308 RR0001) as a charitable donation.
- **Please complete all the information below to avoid delays in processing.**
- **Note** that amounts are approximate based on the value of the securities on the date transferred.
- Signature Guarantee may be required by the donor's broker. Most chartered banks can signature guarantee. Donor's broker may need government issued photo id (e.g. driver's license) to complete the request.
- **NOTE** that Abundance Canada cannot initiate or expedite "push" the transfer. Only the donor or the donor's broker can initiate the transfer.

➔ **Send this document to your broker for processing.**

➔ **Email a copy of the completed form to both: Cardinal Capital Management AND Abundance Canada**  
**clientservices@cardinal.ca TO GIK@abundance.ca**

**NOTE** that Securities may be returned to transferring institution if this form has not been emailed to both email addresses.

## DONOR'S BROKER INFORMATION

|                           |             |               |       |
|---------------------------|-------------|---------------|-------|
| Transferring Institution: |             | Contact Name: |       |
| Address                   | Postal Code | Phone         | Email |
| Brokerage Account Number: |             |               |       |

**NOTE** that all securities on this form **MUST** be in this account. If not, a separate form is required for each account.

## DONOR'S INFORMATION (for tax receipt purposes)

|                |             |       |       |
|----------------|-------------|-------|-------|
| Donor Name(s): |             |       |       |
| Address        | Postal Code | Phone | Email |

## SECURITIES TO BE TRANSFERRED INFORMATION

If additional space is required to list securities from this account, please attach as a separate document and checkmark the box below.

| Quantity                | Security Description | CUSIP/Symbol/Fund Code |
|-------------------------|----------------------|------------------------|
|                         |                      |                        |
|                         |                      |                        |
|                         |                      |                        |
|                         |                      |                        |
|                         |                      |                        |
| Additional Information: |                      |                        |

Approx. Value of Donation in CDN\$: \_\_\_\_\_ See attached.

### Securities Account Number:

  6C8NDVA  
  6C8NDVB

CUID: **NBCS**

DTC#: **5008**

### Receiving Financial Institution:

NBIN INC.  
 Glen Li  
 844-451-3505 | glen.li@bnc.ca

### Receiving Organization:

ABUNDANCE CANADA  
 Mara-Lee Statham, CFO  
 204-488-1985 | GIK@abundance.ca

Place a checkmark beside the appropriate country account.  
 Account # 6C8NDVA is for Canadian Securities. Account # 6C8NDVB is for US Securities.

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
MM/DD/YYYY

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
MM/DD/YYYY

**SIGNATURE GUARANTEE**