

**United Way of Kitchener Waterloo and Area
Share Transfer Form
Gifts of Publicly Traded Securities**

1) Information for Donor's Broker	
KW United Way Broker	BMO Nesbitt Burns, Wayne Kemick
Account Name	United Way of Kitchener Waterloo and Area
Account #	38502653-19
FIN#	T009
Charitable #	10816 0219 RR001
2) To be completed by Donor	
Name	
Address	
Phone #	
Workplace (if applicable)	
Name of Donor's Broker	
Broker's Firm	
Broker's Phone #	
Name of Security	
# of Shares Transferred	
Approx. Value of each Share	\$
Approx. Total Amount of Donation	\$
Date of Transfer to UW's Account	
3) Important Information	
Notification: Please notify Cathy Snyder, CFO, United Way of Kitchener Waterloo and Area csnyder@uwaykw.org , or (519) 888-6100, ext 254, prior to the actual transfer of the shares. To ensure the accuracy of the donation, United Way of Kitchener Waterloo and Area will not authorize any sales of stock without confirmation of type and number of the stock.	
In order to complete this trade: a) Email this form to Cathy Snyder (csnyder@uwaykw.org) or fax to (519) 888-7737, Attn: Cathy Snyder b) Instruct your broker to initiate the trade and transfer the shares to United Way of Kitchener Waterloo and Area	
Authorization: I understand that I will receive a tax receipt from United Way of Kitchener Waterloo and Area for the amount received upon sale of the securities from United Way's accounts. These securities have been donated to United Way of Kitchener Waterloo and Area without restriction and, in accordance with United Way policy, will be sold by the end of the following business day. Please note: because of delay in transfer, the receipted amount may be less, or more, than on the date of transfer from the donor. Signature of Donor: _____ Date: _____	