



## Gift of Securities to Unison Society

To be completed by the donor (owner of the securities) and presented to their investment advisor.

Donor Name:		
Address:		
Phone (Home):	Phone (Work):	Email:

I, \_\_\_\_\_ first and last name \_\_\_\_\_, wish to make a charitable gift consisting of the below-listed security to Unison Society. Further to this, please accept this form as my authorization for you **to transfer in-kind** the below-noted security from my brokerage account to Unison Society's account held at CIBC Wood Gundy. It is my understanding that this transfer and gifting represents a disposition for which I will be provided with a donation receipt from Unison Society. The amount of the receipt will be based on the value as of the close of trading on the date they are received by Unison Society in their account.

**\*\*If donor is donating a Physical Certificate (which is registered in donor's name) they must sign the back of the certificate and provide CIBC Wood Gundy with photo identification and this form as proof of intent.**

Name of Investment Firm:	Name of Investment Advisor:
Advisor's Phone Number:	Name of Security:
Number of Shares:	Approximate Value Per Share:
Transfer From Account #:	Transfer to Account #:

Please transfer the above-noted security, in electronic or otherwise negotiable form to;

**Account of Unison Society [Receiving Account # 7512908919 ]**

CUIDS: WGDB

FINS: T079

DTC: 5030

FEDWIRE: Wells Fargo Bk

ABA: 026005092

Euroclear: 10034

**Robert Gerrie**, Investment Advisor , CIBC Wood Gundy

Popowich Karmali Advisory Group

2700, 500 Centre Street SE : Calgary, AB T2G 1A6

Tel: 403-508-3284 | Fax: 403-260-0410 | Toll Free: 1-844-617-1422

E-mail: [robert.gerrie@cibc.ca](mailto:robert.gerrie@cibc.ca)

After completing and signing, please deliver a copy of this form to your investment advisor as well as providing a copy to:

Unison Society: 1133 7<sup>th</sup> Avenue SW Calgary, AB T2P 1B2

Attention: Rob Locke, Manager of Fund Development

Email: [robl@unisonalberta.com](mailto:robl@unisonalberta.com)

Donor Signature:	Date: year          month          day
------------------	---