

## Transfer Form for Donation of Securities

The Community Foundation of the North Okanagan ("Community Foundation") gratefully accepts donations of securities that are publicly traded on prescribed stock exchanges in Canada and most foreign jurisdictions. Please note that Community Foundation may accept or decline any proposed donation of securities in its sole discretion.

To complete the transfer of securities, please fully complete and sign this form and submit it to all three of the following (by fax or mail):

**To:** **Your personal investment advisor** \_\_\_\_\_

**And to:** **Mr. David Ellis or Ms. Jennifer Martz, RBC Dominion Securities Inc.**  
3129 30th Ave, Vernon, B.C., V1T 2C4  
Facsimile: 250-545-4139 Telephone: 250-549-4059

**And to:** **The Community Foundation of the North Okanagan, Attention: David Fletcher**  
304 – 3402 – 27<sup>th</sup> Ave., Vernon, B.C., V1T 1S1  
Facsimile: 542-8655 Telephone: 250-542-8677

### DONOR INFORMATION

Full name of Donor (as it should appear on the tax receipt) \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_

Alternative telephone \_\_\_\_\_

City \_\_\_\_\_

Province \_\_\_\_\_

Postal code \_\_\_\_\_

Email \_\_\_\_\_

### DONOR'S INVESTMENT ADVISOR

Name of firm \_\_\_\_\_

Contact name/broker \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

City \_\_\_\_\_

Province \_\_\_\_\_

Postal code \_\_\_\_\_

Email \_\_\_\_\_

### AUTHORIZATION TO TRANSFER SECURITIES

I hereby irrevocably and unconditionally authorize and direct the transfer of the following securities (collectively, the "Securities") as a charitable donation to North Okanagan without any condition or restriction whatsoever:

Name of Security	Trading symbol/CUSIP No.	Quantity of Securities or approx. dollar amount*

\* If a dollar amount is specified, a sufficient number of Securities will be transferred having approximately such value on the date of transfer.

Please transfer the Securities to the following account at RBC Dominion Securities Inc.:

FINS: T002                      EUROCLEAR: 90065                      IA CODE: TXD  
DTC: 5002                      ACCOUNT: 813-07443-14                      CUID: DOMA  
BENEFICIARY: The Community Foundation of the North Okanagan, 304 – 3402 – 27<sup>th</sup> Ave., Vernon, B.C.,  
V1T 1S1

**IMPORTANT – PLEASE READ:** By signing this form, I hereby represent and warrant to Community Foundation of the North Okanagan and RBC Dominion Securities Inc. that I have full power and authority to transfer the Securities and that I own the Securities with good title, free and clear of all mortgages, liens, encumbrances, security interests and any other rights of others. Further, I hereby acknowledge and agree that (i) I am authorizing and directing the irrevocable and unconditional transfer of the Securities; (ii) I am aware of and accept the tax and financial consequences of the transfer of the Securities; (iii) the Securities will be transferred to Community Foundation of the North Okanagan without any condition or restriction whatsoever; and (iv) I will receive an income tax receipt from the Community Foundation of the North Okanagan in an amount based on the closing price of the Securities on the date that such Securities are actually received by the Community Foundation of the North Okanagan.

Signature of Donor \_\_\_\_\_

Date \_\_\_\_\_

Please check this box if you would like to be consulted prior to having your name appear on a donor recognition list.