



KAWARTHA LAND TRUST

P.O. Box 2338, 1545 Monaghan Road,  
Peterborough, ON K9J 7Y8  
705-743-5599 • kawarthalandtrust.org

## Making a Gift of Securities to Kawartha Land Trust

Thank you for making a gift of securities to Kawartha Land Trust (KLT)! To donate your gift of stock to KLT, please follow these four steps:

1. Complete the attached transfer form including CUSIP# which will be provided by your broker or investment advisor of the assets being transferred. In order to make sure you receive your official receipt for income tax purposes, please send a copy to Doug Jones, BMO Nesbitt Burns and Mike Hendren, KLT. Forms can be emailed, faxed or mailed to:

### Mike Hendren

KLT, Executive Director  
1545 Monaghan Rd., P.O. Box 2338,  
Peterborough, ON K9J 7Y8  
Tel: 705-743-5599  
Email: mhendren@kawarthalandtrust.org

### Doug Jones

BMO Nesbitt Burns  
40<sup>th</sup> Floor, 1 First Canadian Place, P.O. Box 150  
Toronto, ON, M5X 1H3  
FINS# T009  
Email: doug.jones@nbpcd.com  
Tel: 416-359-7667  
Fax: 416-359-7669

Please note that forms sent by mail will delay the start of the transfer process and may affect the ultimate receipt value. Please notify KLT by telephone or email if you have sent your forms by mail.

2. In order to initiate your transfer, please forward a copy of the completed transfer form to your broker/investment advisor. Your broker can arrange for the electronic transfer of shares to our BMO Nesbitt Burns account:

### Account Number: 660-02981-18

1. First Canadian Place, P.O. Box 150, 40th Floor, Toronto, Ontario M5X 1H3  
FINS: T009 CUID:NTDT DTC: 5043  
EUROCLEAR#:90098 Mutual Fund Dealer/Rep code: 9185-Jkk

3. Please inform KLT once the transfer has been completed. Unexpected and or unidentifiable transfers may make it difficult for the KLT to issue the appropriate tax receipt in a timely manner.

4. Please be advised that the value of the donation receipt will be based on the closing price of the shares on the day the securities are received by KLT in accordance with the KLT Financial and Investment Policy.





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## Letter of Authorization to Transfer Shares to Kawartha Land Trust (KLT)

Donor and Broker Information:

Name of Donor: \_\_\_\_\_ Primary Phone #: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Email: \_\_\_\_\_

Name of Donor's Broker \_\_\_\_\_ Broker's Phone #: \_\_\_\_\_

Broker's Fax #: \_\_\_\_\_ CUSIP #: \_\_\_\_\_

Firm: \_\_\_\_\_ Date of transfer to KLT's account: \_\_\_\_\_

Name of Security: \_\_\_\_\_ Number of shares transferred: \_\_\_\_\_

Value of each share (approx.): \_\_\_\_\_ Total donation (approx.): \_\_\_\_\_

Gift Designation / Recognition:

- I wish my gift to remain anonymous
- I wish my gift to be recognized as follows: \_\_\_\_\_

I understand that I will receive a tax receipt from KLT based on the closing price of the shares on the day the transfer arrives in the KLT account.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

### Kawartha Land Trust Broker Information:

#### **Doug Jones**

BMO Nesbitt Burns  
 Account Number: 660-02981-18  
 FINS: T009 CUID:NTDT DTC: 5043  
 EUROCLEAR#:90098 Mutual Fund Dealer/Rep code: 9185-Jkk  
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