

The Lalli Family Foundation
Gifts of Publicly Listed Securities
Share Transfer Form

Donor

Name: _____

Address: _____

City, Province: _____ Postal Code: _____

Daytime Phone Number: _____ E-mail: _____

Donor's Account

Financial Institution: _____ Account Number: _____

Name of Financial Advisor: _____ Contact Phone Number: _____

Donation

Name of Security: _____ Quantity: _____ CUSIP/ISN: _____

Name of Security: _____ Quantity: _____ CUSIP/ISN: _____

If more than 2 securities being donated, please attach list.

I understand that I will receive a gift-in-kind tax receipt for these securities from The Lalli Family Foundation for the closing price on the date these securities are received in the charity's account. These securities have been donated to The Lalli Family Foundation without restriction and can be sold by the charity at their discretion.

Signature of Donor: _____

Date: _____

The Lalli Family Foundation

Receiving Firm:	BMO Private Wealth Dealer/Rep #: 758/2VR
Account Number:	870-27848
Name of Account:	The Lalli Family Foundation
Charitable Registration Number:	724648605 S0076539

A checklist for your reference:

- ☐ Please call The Lalli Family Foundation **prior to initiating the transfer of securities**, to ensure that your gift is handled smoothly and efficiently. 250-858-8217
- ☐ Notify your financial advisor of your intention to make a gift of securities.
- ☐ Give your financial advisor authorization to initiate the transfer on your behalf. This form, completed and signed, should be sufficient for authorization.
- ☐ **Email a copy of this signed form to matthew.rainsberry@bmo.com**
If you have any questions please call 250-405-2201

Thank you for your generous support of The Lalli Family Foundation