



**City House Foundation**  
in support of The Sacred Heart School of Montreal

**Transfer of Securities form to be completed by Donor**

Name to appear on tax receipt \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

Do you wish to remain **anonymous**? Yes \_\_\_ No \_\_\_

**Gift Designation:**

\_\_\_ Building                      \_\_\_ Greatest Needs

\_\_\_ Bursaries                      \_\_\_ Enrichment Programs

**Account No. of Donor** at delivering institution: \_\_\_\_\_

**Name & Symbol of Security** to be transferred: \_\_\_\_\_

**Number of Shares/Units** of Security to be transferred: \_\_\_\_\_

Date Shares to be transferred: \_\_\_\_\_

Approximate **Value per** Share/Unit: \$ \_\_\_\_\_

Approximate **Total Value** of Gift: \$ \_\_\_\_\_

Name of Donor's broker or portfolio manager:  
\_\_\_\_\_

Telephone number of Donor's broker or portfolio manager:  
\_\_\_\_\_

I understand that I will be issued a tax receipt for the closing value of the shares/units on the date they are received into the brokerage account of the City House Foundation.

Donor signature: \_\_\_\_\_ Date: \_\_\_\_\_

For CAN or USD Securities held in book-base system Canada:

Charity Registration # 89267 0241 RR0001

**CUID# is NBCS Custodian for City House Foundation: National Bank Financial Wealth Management Inc.**

16 766 Route Transcanadienne suite 503 Kirkland Quebec H9H 4M7

Internal use:

Account No.  8VQQA (Capital Fund)

1B8VQNA (Operating Fund) FMV on transfer date: \_\_\_\_\_

Please return by email to: [llefevre@sacredheart.qc.ca](mailto:llefevre@sacredheart.qc.ca) and [ibosmediano@sacredheart.qc.ca](mailto:ibosmediano@sacredheart.qc.ca)

Lili Le Fèvre, Director of Advancement and Iveth Bosmediano, Director of Finance