

GIFTS OF SHARES

SHARE TRANSFER INSTRUCTIONS

- 1) We have enclosed our securities transfer form. Please use this form to identify the securities you wish to transfer including the number of shares and a full description. As this transfer takes place electronically, the **CUSIP and FINS numbers are important**, and are usually provided by your investment advisor.
- 2) This form authorizes your investment advisor to transfer the securities from your account to our account. Your advisor usually requires an original signed copy of the form.
- 3) Please provide the name and contact phone number for your advisor so that we may contact your advisor directly in the event of any delays.
- 4) **Critical!** The completed securities transfer form must be given to your broker to initiate the transfer. A copy of the completed securities transfer form must also be faxed to YESS at 780-466-1374, attn: Accounting.
- 5) Canada Revenue Agency policy requires that the gift date and the amount of the charitable donation receipt be based on the date on which securities are received into the YESS account, not the date the transfer is initiated.
- 6) The transfer of different types of securities take different amounts of time, so we recommend that this process be started well in advance of the end of the year in which you wish the gift to occur. We suggest you initiate the transfer **no later than November 30th**.

NOTE:

Individual circumstances may vary. We encourage donors to consult with their professional advisors before making a gift of shares.

For more information please contact our Donor Relations & Philanthropy team:
Phone: 780-468-7070 | Email: philanthropy@yess.org