



# Gifts of Publicly Traded Securities and Mutual Funds

## Securities Donation Transfer Intent Form

To assist Chalice in processing your donation in a timely manner, please fill out this form and email it to us prior to transferring securities.

Donor Information:

Name of Owner of Securities for charitable receiving purposes

Name:

Address:

Email:

Home Phone:

Business Phone:

Cellular:

Date of birth  
(optional):

Expected Date of Transfer to TD:

Name of Securities and Quantity:

Intended Allocation for this Donation:

We will confirm receipt of your donation by phone or email. You will receive a Gift- in-Kind charitable tax receipt through the mail or by email for this donation in February of the calendar year following the year of donation.

\*Please be advised that the value of the donation receipt will be based on the closing price of the securities on the day that they are received into our account in accordance with Canada Revenue Agency (CRA) regulations.