



## Instructions – Gifts of Publicly Traded Securities

Thank you for your interest in donating publicly traded securities to the National Circus School Foundation (NCSF). Following these guidelines will help us process your donation efficiently.

To transfer securities, you should:

- Fill out the stock transfer form found on the following page.
- Instruct your broker to transfer the shares you want to give to the National Circus School Foundation's broker.
- Send a copy of the completed form by email, fax or mail to the National Circus School Foundation. This step is very important; it will assist the Foundation in identifying the transfer and processing your donation.

### NCSF brokerage firm contact information for the transfer of shares:

**Broker:** Anderson Laurin BMO Nesbitt  
Burns Investment Management

**CUID Number:** NTD

**Account Number:** 330-24017-10

**Agent:** Anderson Laurin BMO Nesbitt  
Burns Investment Management

**Email:** [Laurette.bustamante@nbpcd.com](mailto:Laurette.bustamante@nbpcd.com)

**Telephone:** 514 282-5807

**Fax:** 514 282-5837

### Additional Information:

- Before making a financial decision, it is recommended that you consult a professional financial advisor.
- Shares are considered officially transferred when the agent, Anderson Laurin BMO Nesbitt Burns Investment Management, confirms their receipt to the Foundation.
- Your receipt will be calculated based on the closing share price on the date of their transfer to the National Circus School Foundation's account.
- Upon receiving securities as a donation, the National Circus School Foundation will sell them as soon as possible.



**Form: Transfer of publicly traded securities as a donation**

**Before transferring shares, please send this completed form to Tessie Yanez by:**

**Email:** [tyanez@enc.qc.ca](mailto:tyanez@enc.qc.ca)

**Fax:** 514 982-6025

**Mail:**  
**National Circus School Foundation**  
8181 2nd Avenue  
Montreal, Quebec H1Z 4N9

**If you have any questions regarding this form or your donation, please contact:**

**Tessie Yanez,**  
**Fundraising Coordinator, at**  
**514 982-0859, ext. 240**

**NATIONAL CIRCUS SCHOOL FOUNDATION**

**CRA Registration Number:**  
**89238 8950 RR0001**

**Donor Information**

*(This information will be used to issue a tax receipt.)*

First & Family Names\_\_\_\_\_

Primary Address\_\_\_\_\_

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

Telephone\_\_\_\_\_

Email\_\_\_\_\_

Use this name for receipt? Yes\_\_\_ No\_\_\_

If no, what name should be used?\_\_\_\_\_

And which address?\_\_\_\_\_

**Your Broker Information**

Name of Broker\_\_\_\_\_

CUID Number\_\_\_\_\_

Brokerage Firm\_\_\_\_\_

Telephone\_\_\_\_\_

Email\_\_\_\_\_

**Donated Securities Information**

\_\_\_\_\_  
Name of security      No. of shares/units      CUSIP No.

\_\_\_\_\_  
Name of security      No. of shares/units      CUSIP No.

\_\_\_\_\_  
Name of security      No. of shares/units      CUSIP No.

I authorize the National Circus School Foundation or its agent to contact my broker for the purpose of completing this transaction.

Signature\_\_\_\_\_ Date \_\_\_\_\_