

Gift of Securities Transfer Document ~ St. George's Church

Security/Share transfers from a donor's brokerage account to a charity or church account:

When securities/shares are held in a brokerage account, there is no need to transfer the actual certificates. The donor instructs his or her broker to transfer the securities from his or her account to the church's account. The fair market value will be determined on the day the securities are received and sold by the Church.

Please complete this form and have your own broker e-mail the completed form to Edward Jones at customeraccounttransfer@edwardjones.com or fax to 877-479-5308.

(Name of Donor)

Would like to transfer a gift of securities to St. George's Anglican Church, Guelph

Transfer Details:

Name of Donor's Brokerage Firm	
Name of Donor's Broker	
Phone & Email of Donor's Broker	
Transfer Details (#of shares, type, name of company)	

(Signature of Donor)

(Date)

Edward Jones is the investment firm managing St. George's Church account.

Edward Jones Contact:

Emily McBride, Registered Associate

OR

Lucian Vermeulen, CFP, CIWM, CIM, FCSI Financial Advisor

90 Burnhamthorpe Road, West, Suite #902, Mississauga, ON L5B 3C3

Receiving Account: 20856532(1-6)

FINS#T713

DTC #5012

CUID#EDJC

Should you have any questions or require further information, please feel free to contact our office at (519) 822-1126 or by email to emily.mcbride@edwardjones.com

Thanks!