

**E**ducational **P**rogram **I**nnovations **C**harity Society

CRA Registered Charity # 89214 9964 RR0001

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Barry Waldman, Executive Director & Board Finance Director

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Phone: 902-794-7225 Fax: 902-794-9225

**Donation of Publicly Traded Securities**

*Thanks for considering a gift of securities to* ***E****ducational* ***P****rogram* ***I****nnovations* ***C****harity (EPIC) Society. To transfer securities please complete, sign, scan, and email this form to the Registered Agent for EPIC’s Self-Directed BMO InvestorLine EPIC-Charity Trading Account #21551073-25: Barry Waldman* [*epic@ns.sympatico.ca*](mailto:epic@ns.sympatico.ca) *902-794-7225*

*Upon successful transfer of securities to EPIC’s trading account, EPIC will issue a charitable tax receipt to the donor without fees, derived from market value of the transferred securities at the close of the day received by BMO InvestorLine.*

**Donor Contact Information**

Donor Name:

Civic Street Address:

City, Province: Postal Code:

Donor Email: Donor Phone:

**Donor Broker Information**

Brokerage Firm Name:

Broker Contact Name:

Broker Email: Broker Phone:

**Donated Securities Information**

Security Name: Ticker Symbol:

Donated Security CUSIP: Number of Shares:

Date of Transfer: Estimated Value $:

**Recipient Brokerage Information**

Brokerage Firm Name: BMO InvestorLine

Brokerage Address: 100 King St. W Floor B1 Toronto, ON M5X 1H3

Dealer Code: 9185 CUID: NTDT FINS: T009 DTC: 5043

Recipient Trading Account Name: Educational Program Innovations Charity Society

Recipient Trading Account Number: 21551073-25

**Securities Transfer Authorization**

*By signing and dating below, I am confirming my donor authorization, approval of the donation of the securities described above, and the transfer in-kind to BMO InvestorLine, credited to the trading account of Educational Program Innovations Charity Society, listed as EPIC-Charity #21551073-25.*

Donor Signature: Date Signed: