



Gift of Publicly Traded Securities to The Toronto Waldorf School Foundation

Thank you for your generous support of The Toronto Waldorf School Foundation. A gift of publicly traded stocks, bonds, or mutual funds helps strengthen our mission and impact. Please follow the instructions below to complete your donation.

Instructions to Donor/Donor's Broker:

1. Please complete the following transfer form and send it to CIBC Wood Gundy: Email: Annie.Keshishian@cibc.ca Telephone: (416) 229-3302 Fax: (416) 229-5901
2. In addition, please forward a copy to Jan Gillespie at The Toronto Waldorf School Foundation: Email: finance@twsf.ca

Donor Information

Name: _____

Address: _____

Phone: (_____) _____

Email: _____

Broker Information

Broker Name: _____

Brokerage Firm: _____

Phone: (_____) _____

Account Number: _____

Please deliver the following securities free of charge:

- Name of Security: _____
- Number of Shares/Units: _____
- Market Symbol: _____
- CUSIP Number: _____



Toronto Waldorf School Foundation
Making Waldorf Education accessible to all children

Gift Designation

Your gift will be directed to:

☐ **General Fund** or

Other: _____

Authorization

I authorize the transfer of the securities listed above as a charitable donation to The Toronto Waldorf School Foundation.

Donor Signature: _____

Date: _____

Transfer securities to The Toronto Waldorf School Foundation using the following details:

Account Name: The Toronto Waldorf School Foundation

Account Number: 414 24253 15

Brokerage: CIBC Wood Gundy

FINS: T079

CUIDS: WGDB

DTC#: 5030

Dealer #: 9280

Rep Code: WLE

Investment Advisor: Newsome Investment Group

Contact Name: Annie Keshishian **Email:** Annie.Keshishian@cibc.ca

Phone: (416) 229-3302 **Fax:** (416) 229-5901

Important Notes

- The Toronto Waldorf School Foundation will issue a donation receipt based on the fair market value of the securities at the close of business on the date they are received.
- For further assistance, contact Jennifer Deathe, Advancement Director, at jdeathe@twsf.ca