



**GIFT OF SECURITIES FORM**

Securities are received by IA Private Wealth Inc. and are valued at the close of trading for that day.  
A tax receipt will be issued for that amount.

Name of Donor: \_\_\_\_\_

Street Address: \_\_\_\_\_

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

Telephone- Day: (\_\_\_\_) \_\_\_\_\_ Evening: (\_\_\_\_) \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Name of broker: \_\_\_\_\_

Brokerage Company: \_\_\_\_\_ Account Number: \_\_\_\_\_

Broker's telephone number: (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_

Name of securities: \_\_\_\_\_

Number of shares or face value of the bonds or coupons: \_\_\_\_\_

Description of securities (e.g. common, preferred, debentures, etc.)  
\_\_\_\_\_  
\_\_\_\_\_

Please instruct your broker to transfer the securities to:

**Receiving Institution:**

IA Private Wealth Inc.  
Account Transfers Department  
522 University Ave  
Toronto, ON M5G 1Y7

**Investment Advisor:**

John Tabet  
Lara Huska – Associate Investment Advisor  
(905) 842-8288 Ext 221  
(905) 842-5635  
NBCS DTC: 5008 Euroclear: 93044  
37-A9ZN-A

Phone:

Fax:

CUID #:

Hope Story Investment Account:

\_\_\_\_\_  
Signature of Donor

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Date

Upon confirmation of the transfer, please mail or email this form to:

**Hope Story**

Charitable Registration #872164561 RR0001

**Phone: 1-866-839-5437 Email: admin@hopestory.ca**

**Website: www.hopestory.ca**

*On behalf of Hope Story, thank you for your generous gift of securities*