
How to Make a Gift of Securities to Second Harvest

1. Complete the attached form and send it to your financial advisor or institution. Remember to let Second Harvest know that we can expect your gift so that we can issue a tax receipt. After submitting your form, please reach out to:

Natasha Bowes
Senior Manager, Philanthropy
Tel: (647) 612-6597
natashab@secondharvest.ca

2. Second Harvest will work with your financial institution to process the donation.
3. Second Harvest will issue a tax receipt to donors upon receipt of proceeds.
 - a. Please note that we will need your name and mailing address in order to issue a tax receipt. We will respect any preferences regarding communications and recognition. For example, we would not list a name in our donor list if someone preferred to remain anonymous within our donor community.
 - b. If you would prefer to remain completely anonymous to Second Harvest, the best place to donate securities would be on the Second Harvest page on the Canada Helps website – on this platform the tax receipt would be issued immediately and electronically.

Please complete this form for use as Authorization to facilitate a timely transfer. Transfer requests that do not contain the information requested herein may result in delayed deliveries. Please ensure a copy of any necessary supporting documentation is attached to your transfer request such as a Corporate Resolution with sample signatures for a corporate account, Powers of Attorney where the signing authority for an account differs from the client of record, etc.

Please transfer the following position:

Description (1): _____

Quantity: _____ CUSIP/ISIN: _____

Description (2): _____

Quantity: _____ CUSIP/ISIN: _____

Delivering Institution Information

Delivering Institution Name: _____

Account Name: _____

Account #: _____ Delivering Institution CUID or DTC: _____

Contact Name: _____ Signature _____ Phone Number _____

Receiving Institution Information

Receiving Institution Name: _____

Account Name: _____ Canada Revenue Agency (CRA)
Charity Registration Number: _____

Account Number: _____ Receiving Institutions CUID or DTC: _____

Contact Name: _____ Signature _____ Phone Number _____

For Internal Use Only

DEALER/REP CODE _____	DELIVERING INSTITUTION _____
CUID _____ DTC _____ EUROCLEAR # _____	
CONTACT NAME _____	ADDRESS _____
CONTACT TELEPHONE _____	CONTACT _____ TELEPHONE _____

Additional Information: *Please include any additional Contact Information (if applicable).*

Contributing Client Authorization:

Client Signature: _____ Date: _____

RUSH - For Internal Use Only
Please fax a completed copy of this form to the Client Transfer Services department. The fax number can be found within the Charitable Donation procedures section of the Client Transfer Resource Centre.

TD Waterhouse Canada Inc.
TD Waterhouse Private Investment Counsel Inc.
TD Investment Services Inc.
Client Transfer Services
c/o Distribution Centre
60 Northwind Place
Scarborough, Ontario
M1S 5L4

The Canada Trust Company
Private Trust
Client Transfer Services
c/o Distribution Centre
60 Northwind Place
Scarborough Ontario
M1S 5L4

Securities Transfer Client Disclosure

In our business we are dedicated to continually improving Client Service. This Client Disclosure and informational document was developed to help you understand the account transfer process. **It is important to read this document carefully before signing the section called CONTRIBUTING CLIENT AUTHORIZATION on this transfer form.** Should you have any questions after reading this document, please be sure to address your inquiries with your Receiving Institution's Investment Representative.

How long will my transfer take?

The time required to transfer your security(ies) will for the most part depend on the type of investment products you currently hold. Please note that all your assets may not all be transferred at exactly the same time.

Non-registered Accounts:

Under current IDA regulations, this type of transfer may **take approximately 10 business days from the time of receipt by the Delivering Institution**, if it is being delivered via the Automated Transfer Online Notification System (ATON). If the transfer is not being delivered via ATON, the length of time to complete the transfer could exceed 10 business days.

Types of Investment Products

Mutual Funds:

Currently, mutual fund products take longer to fully transfer, and may result in a possible delay into the charitable organization's account, due to the requirement of re-registering the mutual fund at the Fund Company. **On average mutual funds require 5 - 10 business days to transfer from the time the mutual fund power of attorney is received** by the Receiving Institution.

Guaranteed Investment Certificates & Term Deposits:

Generally, a Guaranteed Investment Certificate (GIC) **is not transferable IN-KIND (as is) prior to the maturity date.** Most GIC's must be transferred IN-CASH upon their maturity. Please check the terms and conditions with the Institution which currently holds your investment. If your GIC matures in more than 6 months' time, please submit your transfer request one month prior to maturity.

Other Investment Products:

There are many other investment products which may be non-transferable, non-redeemable or subject to other delays. Some of these products include Mortgages, Foreign Securities, and Non-transferable Bonds (minimum denomination requirements).

Rejected Transfers:

A transfer request may be rejected by the Delivering Institution for a number of reasons, such as, insufficient funds to cover fees, account not in good standing, i.e. undermargin, short position(s), etc. If for any reason your transfer has been rejected by the Delivering Institution, they may return the transfer request to the Receiving Institution unprocessed. **When the reason for the rejection has been rectified, the transfer process may begin again and the Delivering Institution may then have approximately 10 business days, from the date of receipt of the transfer documents to process the transfer.**

How much will it cost to transfer my security(ies)?

Transfer Fees:

Most institutions charge a transfer out fee at which the cost varies. It is important to ensure that you have sufficient funds available in your account at the delivering institution to cover your transfer and administration fees, as the delivering institution may reject the transfer unprocessed, thus creating a lengthy delay.