



Gift of Shares

Share Transfer Instructions

1. We have enclosed our securities transfer form. Please use this form to identify the securities you wish to transfer including the number of shares and a full description. As this transfer takes place electronically, the **CUSIP and FINS numbers are important** and are usually provided by your investment advisor.
2. This form authorizes your investment advisor to transfer the securities **in-kind** from your account to our account. Your advisor usually requires an original signed copy of the form.
3. Please provide the name and contact information for your advisor so that we may contact them directly in the event of any delays.
4. The completed securities form **must be given to your broker to initiate the transfer**. Additionally, kindly scan a copy of the completed form and send via email to giving@yess.org. We will inform our Accounting Department so that they are aware of the pending transfer.
5. Canada Revenue Agency policy requires that the gift date and the amount of the charitable donation receipt be based on the date on which securities are received into the YESS account, not the date the transfer is initiated.
6. The transfers of different types of securities take different amounts of time, so we recommend that this process be started well in advance of the end of the year in which you wish the gift to occur. We suggest you initiate the transfer **no later than November 30**.

Individual circumstances may vary. We encourage donors to consult with their advisors before making a gift of shares.

Legal name: Y.E.S.S.: Youth Emergency Shelter Society of Edmonton o/a (YESS) Youth Empowerment and Support Services

CRA Registered Charitable No.: 12953-7437 RR 0001

Mailing Address:

Youth Empowerment and Support Services
9310 82 Avenue NW, Edmonton AB T6C 0Z6

For more information, please contact:

Eileen Papulkas, Senior Development Officer, Planned Giving
eileen.papulkas@yess.org | 780.468.7070 Ext. 298

Disclaimer: The material listed above is intended to provide general information and should not be construed as legal and/or other professional advice. The above should not be used without first reviewing it with your own legal or other professional advisors to determine its suitability for your unique estate planning situation



Donation of Publicly Listed Securities Letter of Direction

Please fill out this form completely with your broker to transfer electronically.

I, the client name mentioned below, would like to donate in-kind the following securities to charity:

Name of donor/shareholder: _____

Address & Phone: _____

Delivering Institution: _____

Broker/Contact Name: _____

Address: _____ Phone: _____

Account number: _____

Quantity of shares / units: _____ OR dollars: \$ _____

Security code: _____

Description: _____

I hereby authorize the transfer of the above listed shares/units to the **Youth Emergency Shelter Society of Edmonton.**

Signature of shareholder

Date

Signature of joint shareholder (if applicable)

Date

These securities are to be forwarded to the charity account at CIBC World Markets Inc. (CIBC Wood Gundy):

Receiving Institution: CIBC World Markets Inc. (CIBC Wood Gundy)

Account Name: Youth Emergency Shelter Society of Edmonton –Operating Fund

CRA Registered Charitable Number: 12953-7437 RR 0001

Charity Account Number: 760-16831-18

FINS Number: T079

Receiving Institution's CUID or DTC: CUID WGDB, DTC 5030

Contact Name: Kerry Harty, B. Comm., CIM, FCSI Senior Portfolio Manager

Attn: Iva Coscarella, Administrative Assistant

Email: Iva.Coscarella@cibc.com Phone: (780) 429-8964 | Fax: (780) 429-8999

Please place Signature
Verification stamp in box:

YESS Mailing Address:

Youth Empowerment and Support Services 9310 82 Avenue NW, Edmonton AB T6C 0Z6

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