



# Gift of Securities Letter of Direction Save A Family Plan

This Letter of Direction is to be completed by the Donor and serves as authorization and instruction to transfer specified securities to *Save A Family Plan (SAFP)*.

Please complete this form, present one copy to your financial advisor and then fax it to:

- (1) Cohen Group Private Wealth Management at Wellington West Capital Attn: Tom Mathies at 519-645-0902 or email at [tmathies@wellwest.ca](mailto:tmathies@wellwest.ca).
- (2) Save A Family Plan Attn: Patty Keffer at 519-672-6379 or email at [pkeffer@safp.org](mailto:pkeffer@safp.org)

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

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

Name of Advisor: \_\_\_\_\_ Advisor's Telephone: \_\_\_\_\_

Firm: \_\_\_\_\_

Account No. \_\_\_\_\_

Name of Security: \_\_\_\_\_ # of Units Transferred: \_\_\_\_\_

Estimated Total Value of Donation: \_\_\_\_\_

Date of Transfer to SAFP Account: \_\_\_\_\_

<b>Contact Name:</b>	<b>Cohen Group Private Wealth Management, Attn: Tom Mathies Wellington West Capital #802 – 380 Wellington Street, London, ON N6A 5B5 TEL: (519) 645-4861 FAX: (519) 645-0902</b>
<b>Name of Account:</b>	<b>Save A Family Plan</b>
<b>Account Number:</b>	<b>4AN674A(Canadian Securities) OR 4AN674B (US Securities)</b>
<b>BBS FINS#</b>	<b>T080</b>
<b>CUID/DCS:</b>	<b>NBCS                      Dealer/Rep : 9835-WWCG</b>
<b>DTC:</b>	<b>5008</b>

I understand that I will receive a charitable tax receipt for the closing price based on the date the shares are received in the Save A Family Plan brokerage account. All shares will be sold upon receipt.

Signature of Donor: \_\_\_\_\_ Date: \_\_\_\_\_