

LUNENBURG COUNTY LIFESTYLE CENTRE
CAMPAIGN OFFICE
60 PLEASANT STREET
BRIDGEWATER NS B4V 2X9
902 541-4374
LCROCKETT@LCLC.CA



PROCEDURES FOR TRANSMITTING GIFTS OF PUBLICLY TRADED SECURITIES TO THE LUNENBURG COUNTY LIFESTYLE CENTRE CAMPAIGN

Electronically:

Donors may transfer gifts of publicly traded appreciated securities to the campaign electronically or by mail.

We require the following information from the donor, prior to transfer, in order for our broker to accept the electronic transfer (see attached):

- 1. Quantity and name of security.**
- 2. CUSIP number of the security (donor to request this number, if unknown, from his/her broker).**
- 3. Name of donor's broker and account number of donor.**
- 4. CUID (customer unit identifier directory) of delivery institution (donor to request this number, if unknown, from his/her broker).**

ELECTRONIC TRANSFER:

The simplest way to make gifts of appreciated securities to the Centre is by way of electronic transfer. Donors may have their broker transfer securities by wire directly to our brokerage account.

In order to do this, the donor must notify, in writing, the broker handling their account, stating the number and type of shares they wish to transfer, and providing the name of our broker and the account number as shown below. The broker may then electronically transfer the shares.

LCLC Broker is:

Judy Estey
CIBC Wood Gundy
37 Pleasant Street
Bridgewater NS B4V 1M9
judy.estey@cibc.ca
902 543-9882
LCLC Account Number: 274-10693-28

By mail:

Share certificates can also be reregistered in the name of the Lunenburg County Lifestyle Centre, and forwarded by registered mail.

- If the donor's broker holds his/her certificate, the donor must notify the broker in writing what shares are to be transferred.
- If the owner holds the certificate and wants to donate shares to the LCLC, he/she should mail an unendorsed certificate and a signed stock power form in separate envelopes, by certified mail. A bank or the donor's broker should guarantee the signature on the stock or bond power and he/she should sign their name exactly as it appears on the security.

Please Note:

The valuation date for charitable tax purposes will be the date the shares are received and deposited to the Lunenburg County Lifestyle Centre campaign account.

The LCLC reserves the right to tactfully decline gifts if, in their opinion, acceptance requires our staff to undertake time-consuming disposal processes out of proportion to the value of the gift (including securities not listed on major stock exchanges and/or not easily liquidated).

THANK YOU

Notice from Donor to Lunenburg County Lifestyle Centre Campaign Office

To: LCLC Campaign Office, 60 Pleasant Street, Bridgewater NS B4V 2X9
lcrockett@lclc.ca

From: _____
(Name – please print)

Date: _____

I would like to donate the following shares to the LCLC:

	# of Shares	Name of Common Share	CUSIP #
1			
2			
3			
4			

Donor Brokerage Firm: _____

Name of Broker: _____

Broker CUID #: _____ My Account #: _____

These shares will be forwarded to LCLC account 274-10693-28; CIBC Wood Gundy; Broker Judy Estey.

Sincerely,

(Signature of Donor)

Note: We suggest you forward a copy of this request to your broker.

Thank you for helping shape the future of Lunenburg County!