



**To donate your gift of stock to Interval House, please follow the following steps:**

1. Download and complete all sections of the transfer form, including the CUSIP # of the assets you plan to transfer. You can get the CUSIP # from your broker.
2. To facilitate the transfer and ensure you receive your official charitable tax receipt, forward a copy of the completed form to Katie Mosher:

Email: [kmosher@intervalhouse.ca](mailto:kmosher@intervalhouse.ca)

Fax: 416-928-9020

Attn: Katie Mosher  
Interval House  
PO Box 35003 STN BRM B  
Toronto, ON M7Y 6E3

Please note: Forms sent by mail will delay the start of the transfer process and may affect the value of the securities donated. Please notify us if you plan to mail in your form.

3. In order to initiate your electronic transfer, please forward a copy of your completed transfer form to your broker or investment advisor.

Your broker can arrange the electronic transfer of shares to our BMO Harris Private Banking Account:

CUID: NTDB FINS #T009

DTC: 5043 Institution ID: 53350 Agent Bank: 53350

Dealer Rep Code: 7555-

Euroclear: Account #90098

Credit to Account Number: 870-02834 Interval House

4. Please inform Katie Mosher once your transfer has been completed. Unexpected or unidentifiable transfers may make it difficult for Interval House to issue the appropriate tax receipt.

NOTE: The value of the donation receipt will be based on the closing price of the security, on the date the securities are received by Interval House, in accordance with Canada Revenue Agency Regulations.



## Gifts of Publicly Traded Securities to Interval House

**Please note that Interval House cannot issue an income tax receipt until we are aware of your donation.** In order to ensure prompt and accurate receipting, before transferring securities to our account, please fax or email this form to:

Email: [kmosher@intervalhouse.ca](mailto:kmosher@intervalhouse.ca)  
Fax: 416-928-9020

Attn: Katie Mosher  
Interval House  
PO Box 35003 STN BRM B  
Toronto, ON M7Y 6E3

### Donor Information

First Name:		Last Name:	
Mailing Address:		City:	
		Province:	
		Postal Code:	
Daytime Phone Number:		Email Address:	

### Description of Securities

This letter will confirm my intention to donate the following Securities to Interval House:

Security Description:	
Quantity:	
CUSIP/ISIN:	

Security Description:	
Quantity:	
CUSIP/ISIN:	

### Gift Designation

To ensure your gift is used as instructed, please confirm your desired designation with Interval House before making your donation.

- Highest Need  
 Specific Designation: \_\_\_\_\_

To transfer securities, please advise your broker of the following details:

CUID: NTDB FINS #T009  
DTC: 5043 Institution ID: 53350 Agent Bank: 53350  
Dealer Rep Code: 7555-  
Euroclear: Account #90098  
Credit to Account Number: 870-02834 Interval House



**Please be advised that the value of the donation will be based on the closing price of the securities on the day that they are received by Interval House.**

Interval House Charitable Registration Number: 11897 1159 RR0001