

# JÖRGENDANCE

## GIFT OF PUBLICLY TRADED SECURITIES TO BALLET JÖRGEN CANADA

Please note that Ballet Jörgen Canada is unable to issue an income tax receipt until we are aware of your donation. In order to ensure prompt and accurate receipting of your donation, **prior to transferring securities to our account, please fax or email this form to:**

**Ballet Jörgen Canada**  
160 Kendal Avenue  
Building C, Room 126  
Toronto ON M5R 1M3

☎ 416-415-5000 ext. 2857 or 416-961-4725  
☎ 416-415-2865  
✉ [info@balletjorgen.ca](mailto:info@balletjorgen.ca)

### Donor Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

### Description of Securities

This letter will confirm my intention to donate the following securities to Ballet Jörgen Canada:

Security Description \_\_\_\_\_ Quantity \_\_\_\_\_ CUSIP/ISIN \_\_\_\_\_

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### Broker/Delivering Custodian Information

Name of Firm \_\_\_\_\_ FINS# \_\_\_\_\_ Fax \_\_\_\_\_

Name of Broker \_\_\_\_\_ Phone \_\_\_\_\_

Account Name \_\_\_\_\_ Client Account Number \_\_\_\_\_

### Gift Designation

- Highest Priority Needs of Jörgen Dance (default); or  
 Specific Designation:

### Donor Authorization

Signature \_\_\_\_\_

Date (Day/Month/Year) \_\_\_\_\_

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

For Canadian securities, transfer to:

**BMO InvestorLine:** Account No. 239-56413  
CUID: NTDT  
BALLET JORGEN CANADA

**To donate your gift of stock to Ballet Jörgen Canada, please follow the following four steps:**

- 1.** Download and complete all sections of the transfer form including the CUSIP # (which is provided by your broker/investment advisor) of the assets being transferred. In order to facilitate the transfer and ensure you receive your official receipt for income tax purposes, please return a copy of the completed form to the General Manager at Ballet Jörgen Canada. Forms can be faxed to 416-415-2865, emailed to [stephen@balletjorgen.ca](mailto:stephen@balletjorgen.ca), or sent by mail to:

**Attn: [Stephen Word, General Manager](#)**

**Ballet Jörgen Canada**

160 Kendal Avenue Building C, Room 126

Toronto ON M5R 1M3

**PHONE** 416-961-4725 or 416-938-9153

**FAX** 416-415-2865

**Note:** Forms sent by mail will delay the start of the transfer process, and may affect the ultimate receipt value. Please notify the General Manager by telephone at 416-938-9153 if you send by mail.

- 2.** In order to initiate your electronic transfer, please forward a copy of the completed transfer form to your broker/investment advisor.

**For Canadian securities,**

your broker can arrange the transfer of shares by:

1. calling 1-888-776-6886
  2. forwarding the completed form as instructed by a BMO InvestorLine representative.
- 3.** Please inform the General Manager at Canada's Ballet Jörgen once the transfer has been completed. Unexpected and/or unidentifiable transfers may make it difficult for us to issue the appropriate tax receipt.
  - 4.** Please be advised that the value of the donation receipt will be based on the closing price of the security, on the day the securities are received by Canada's Ballet Jörgen's custodian, in accordance with our Board Policy and Revenue Canada Regulations.