

## Agreement to Donate Publicly Listed Securities

- > Step 1: Please complete this form and email it to Lucy White, Coordinator, Gift Management at [lwhite@national.ballet.ca](mailto:lwhite@national.ballet.ca) **prior** to having the securities transferred to our brokerage account.
- Step 2: Contact your broker to initiate the transfer.
- > Be advised that the shares will be sold by The National Ballet of Canada at any time considered appropriate.
- > A tax receipt will be issued for the closing price recorded on the day the securities are received into the National Ballet's account at BMO Nesbitt Burns or at sale value if securities are disposed of on day of receipt.

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Date: \_\_\_\_\_ (Date of transfer of Securities)

This letter will confirm my intention to donate the following to: (Please Select Appropriate Organization)

- The National Ballet of Canada
- The National Ballet of Canada, Endowment Foundation

Type of Security \_\_\_\_\_ (shares, bills, warrants, futures, bonds)

Name of Issuer: \_\_\_\_\_

Number of units to be transferred to The National Ballet of Canada: \_\_\_\_\_

Name of Broker: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Brokerage Account Number: \_\_\_\_\_ (or Social Security Number for American Donors)

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Please select appropriate account:

Gifts to The National Ballet of Canada

\_\_\_ BMO Nesbitt Burns account for gifts originating from Canadian sources is:  
FINS #T009 615-87977-19.

\_\_\_ BMO Nesbitt Burns account for gifts originating from American sources is:  
DTC #5043 615-87977-19.

Gifts to The National Ballet of Canada, Endowment Foundation

\_\_\_ BMO Nesbitt Burns account for gifts originating from Canadian sources is:  
FINS #T009 615-02729-19.

\_\_\_ BMO Nesbitt Burns account for gifts originating from American sources is:  
DTC #5043 615-02729-19.

National Ballet contact at BMO Nesbitt Burns is Jordan Applebaum at 416 928 0950

Donor's Name:

\_\_\_\_\_  
(Please print)

Address: \_\_\_\_\_  
(Apt., Street Address)

Signature: \_\_\_\_\_

\_\_\_\_\_  
(City, Province, Postal Code)

Email:

\_\_\_\_\_

Telephone:

\_\_\_\_\_  
(Day Telephone Number)

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For more information, please contact **Lucy White, Coordinator, Gift Management**  
470 Queens Quay West, Toronto, ON, Canada M5V 3K4 Phone: 416 345 9686 x333 Email: [lwhite@national.ballet.ca](mailto:lwhite@national.ballet.ca)

The National Ballet of Canada is a registered charity. Charitable Business Number: 11905 1449 RR0001

The National Ballet of Canada, Endowment Foundation is a registered charity. Charitable Business Number: 88989 8722 RR0001

**Thank you.**